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ABSTRACT

This SPEC (Systems and Procedures Exchange Center) Kit presents the results of a survey of Association of Research Libraries (ARL) member libraries designed to document how ARL member libraries are collecting, using, and modifying their data on reference service transactions. A total of 74 of 124 ARL member libraries responded to the survey. A copy of the questionnaire with tabulated results is presented. Representative documents include: (1) reference desk activity logs from 12 libraries; (2) other reference activity logs from seven libraries; (3) definitions/guidelines/procedures from 12 libraries; (4) statistical reports from nine libraries; and (5) other reference assessment methods from four libraries. A list of 24 selected resources (i.e., books, journal articles, and Web sites) is included. (MES)

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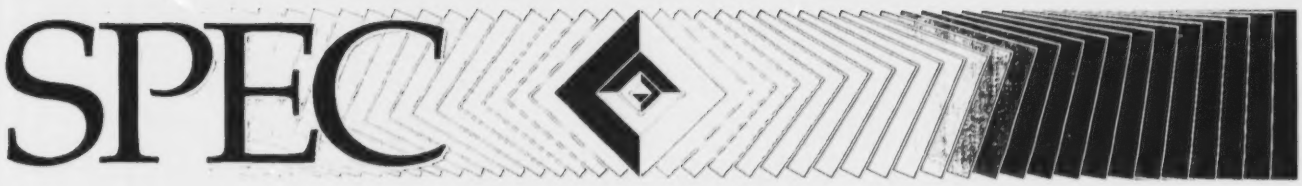

Reference Service Statistics & Assessment

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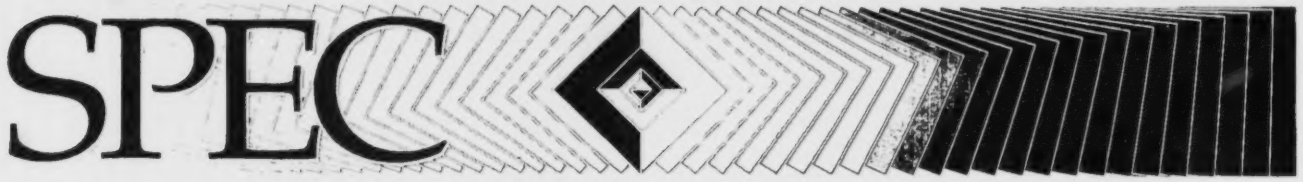

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SPEC

SURVEY

ASSOCIATION OF RESEARCH LIBRARIES

OFFICE OF LEADERSHIP AND MANAGEMENT SERVICES

Executive Summary

Introduction

Research libraries have been gathering data on reference transactions for decades. This venerable practice has gained renewed attention in recent years as many academic libraries have experienced a sharp reduction in the number of transactions recorded. The cause and meaning of this widespread occurrence has sparked considerable discussion in the profession.

This SPEC survey examines and documents how ARL member libraries are collecting and using their data on reference service transactions. For the purposes of this survey, a reference transaction was defined as an information contact that involves the knowledge, use, recommendations, interpretation, or instruction in the use of one or more information sources by a member of the library staff. The transaction can take place at a reference desk, via online chat, individual consultation, mail, or telephone. The definition does not include simple directional questions, bibliographic instruction presentations to groups, or database and Web site usage.

In the summer of 2002, this survey was distributed to the 124 ARL member libraries. A total of 77 responses (62%) were received. It was hoped that the survey results would reveal current best practices, but instead, they revealed a situation in flux. It is now hoped that the results will stimulate reflection on how the profession can develop more satisfactory methods for recording and assessing the reference encounter.

Reference Data Collection Techniques

Reference transactions no longer occur solely at a reference desk and libraries are attempting to capture data from a number of service points. Not surprisingly, every one of the responding libraries offers reference service in person at a desk. Telephone and e-mail are utilized by every library that responded, while the vast majority (91%) also offers service via mail and by appointment. Although not as ubiquitous as other methods, chat reference and reference question Web forms are available in many of the libraries (55% and 71%, respectively).

Respondents were asked to identify the methods by which this wide variety of reference service is evaluated. By far the most common measure is the number of reference transactions (96%). Surveys, including LibQUAL+™, are the next most popular technique for assessing performance. Other assessment techniques, such as focus groups and patron interviews, have been less widely adopted. For those respondents who record data on reference transactions, the overwhelming majority (99%) do so manually, using the traditional tick mark on a piece of paper. The collection method is changing somewhat as new technologies are used to deliver reference service. For example, a substantial number of libraries reported using software to automate the data-gathering process for chat reference interactions.

Data Collection Periods

While the respondents uniformly report that they collect data on the number of reference transactions, there is great variety in when the data is recorded. Slightly over half (51%) reported collecting data on reference transactions throughout the entire year. Others reported employing a diverse set of collection periods. Some collect data during designated sampling days only, while others collect some basic data throughout the year and more specific data

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only during sampling periods (e.g., for reporting statistics to ARL). Other libraries collect data on chat reference throughout the year while using sampling periods for desk and telephone interactions. Many commented that techniques varied within the library, with different service units developing individualized approaches tailored to their specific data needs. From the responses it is clear that ARL libraries have not reached a consensus on how often reference transaction data should be recorded.

The two most prevalent reasons given for collecting statistics beyond the short periods designated for ARL statistics sampling were the need to gather data over a longer time period (79%) and a concern over the accuracy of projecting annual statistics based solely on a single week's worth of data (71%). Sheer momentum may also be a factor in why some libraries collect statistics year round. History or tradition was cited in the comments of several respondents. As one succinctly summarized, "We have always done it this way."

Reference Activity Recorded

Respondents reported that they gather data covering a wide range of reference interactions. At least 60% routinely gather transaction data not only for questions asked at a reference desk, but also for telephone inquiries, e-mail reference questions, individual appointments, questions asked at other service points (e.g., circulation, media desk), mailed reference questions, chat reference questions, and questions sent directly to individual staff members via telephone or e-mail. Fewer libraries reported recording data on office hours, or the use of research guides and other user aids found on the library's Web site.

In deciding what data to record, libraries generally opted for quantitative over qualitative information. The most popular data elements collected are: Date (91%), Type of Question (e.g., reference or directional, etc.) (91%), Time of Day (84%), and Location of the Reference Transaction (80%). A significant minority also reported recording the amount of time needed to answer the question (43%). More subjective measures have not been widely adopted. Only 11% of respondents indicated that they collect data on the difficulty of the question, while only 3% routinely gather data on the adequacy of the response. Respondents were not asked to supply reasons for why they collected the data they did, but it is likely that convenience is a primary factor. It is certainly easier to note the number of transactions than it is to determine the quality of the encounter.

Changes in Data Collection Practices

Nearly half of the responding libraries reported that in the last three years they have made significant changes to the way reference transactions are recorded. Ironically, while some libraries are going from collecting data regularly to using sampling techniques, others reported that they planned to stop using sampling and start collecting data on a daily basis. Other recent changes can be attributed to the creation of new services, especially chat reference. Many libraries seem to be taking advantage of the automatic recording of data offered by most chat software packages. In some cases the data collected by chat software, and a desire for comparable data, has motivated a review of the data collected across all reference service points.

The changing nature of reference service appears to be causing other modifications in the way reference service statistics are collected. Perhaps motivated by declining activity at the reference desk itself, many libraries reported placing greater emphasis on fully recording reference activity taking place at other service points (e.g., circulation, reserves, etc.). Respondents largely attributed the decline in reference desk activity to the Internet and the fact that researchers no longer need to enter the library to conduct research or ask questions. This reasoning has led many to increase efforts to capture off-desk interactions such as e-mail queries sent directly to individual staff members.

Analysis and Use of Reference Transaction Data

When asked to identify the category of staff responsible for analyzing reference transaction

data, survey respondents indicated that library administrators and reference librarians are most often responsible for this task. Other groups or individuals who use this data include various reference working groups or teams, the Management Information Services unit or manager, the ARL statistics coordinator, and library administrative groups. Spreadsheet software is the application of choice for analyzing the data. The use of statistical packages, such as SPSS, is not widespread. More libraries analyze their statistics manually than use statistical software. This may reflect the backgrounds and statistical knowledge of those involved, or, since responses to another survey question indicated that the most commonly recorded data elements are the time, date, and location of the reference interaction, it may be a result of the nature of the data collected. These elements don't require the use of a sophisticated data analysis tool to interpret their meaning.

Contributing to national statistics, monitoring trends in reference services, and determining appropriate staffing levels were the most frequently cited uses of the data collected on reference services. Somewhat surprisingly, justifying the budget was not a consideration for the majority of respondents; only 34% indicated that they use reference service statistics for this purpose. Data is disseminated primarily through internal library reports and reports to national, state, or regional organizations. Relatively few libraries reported distributing their data through other methods such as placing the information on their Web page, library newsletter, or via press releases.

Library Self-Evaluation: Minimum, Desired, and Actual Performance Ratings

Respondents were asked to indicate their impressions about the quality of their library's assessment activities with respect to recording, analyzing, and using reference transaction data. After indicating their expectations for the minimum level and desired level of service on a scale of 1 to 9, where 1 is lowest and 9 is highest, they were asked to rate their library's actual performance level. While they have fairly high expectations on average, the respondents did not give themselves high marks when asked to assess their own performance on these three tasks. As a group, the responding libraries rated their performance as **below** the minimum performance level in the analysis and use of reference transaction data. Only in recording reference transactions did they collectively indicate that their perceived performance was above the bare **minimum** performance level. And, in all three areas (collection, analysis, and use of data) the library's performance was deemed to fall far short of the desired performance levels. Although the reasons for the poor self-ratings were not disclosed, the scores clearly indicate widespread dissatisfaction with current practices relating to reference transaction data.

Further analysis of the data did not reveal any obvious correlation between data collection strategies and high or low self-rankings. Libraries that use assessment methodologies other than simply counting transactions, such as LibQUAL+™ and other user surveys, were comparably grouped with their peers when it came to rating their own performance. Not surprisingly, libraries that reported collecting more categories of data rated themselves highest on their statistics recording performance, but their ratings on analyzing and making use of the data were scattered across the scale of 1 to 9. Libraries that had changed, or were planning to change, their practices did not rate themselves significantly differently than those who had not made or were not planning changes.

Conclusion

These survey responses are a snapshot of a time of uncertainty and change in ARL libraries. Nearly half of the respondents have made significant changes to their data collection practices in the last three years, while over half indicate that they are planning future changes. Libraries seem to be casting about for the ideal solution, with one library investigating the methods recently abandoned by another. Some libraries are considering sampling, while others are expanding their data collection periods. Some are

adopting more complicated forms, while others are planning to simplify theirs.

The survey reveals a general lack of confidence in current data collection techniques. Some of the dissatisfaction may be due to the fact that 77% of responding libraries reported that the number of reference transactions has decreased in the past three years. With many librarians feeling as busy as ever, some have concluded that the reference service data being collected does not accurately record their own level of activity. This is not a new sentiment, the library literature is replete with lamentations over the inadequacies of reference statistics, but the dramatic decline in recorded reference desk activities appears to have generated renewed interest in addressing the problem of developing meaningful measures of reference activity. The migration of reference activity to areas beyond the traditional reference desk (e-mail, chat, office consultations), has further motivated many libraries to re-examine and modify their current practices.

Given the long history of complaints about traditional methods for recording and assessing reference services, it is perhaps not surprising that as a group ARL libraries report being unhappy with their own procedures. What is alarming is the depth of dissatisfaction. The mean scores for a library's actual performance ratings are almost the same as, and in general lower than, the minimum expected performance levels. These self-ratings, and the numbers of libraries that are exploring significant changes to their practices, demonstrate a widespread concern regarding the collection of data on reference services. It is hoped that this survey, by calling attention to the depth of the problems, will inspire libraries, librarians, and library associations to devote the resources necessary to developing innovative, efficient, and effective procedures that can be widely adopted. The place to begin is in our own institutions. Over 80% of respondents indicated that a person or group in their library was responsible for coordinating the collection of reference transaction data. Those filling this role can examine their own practices, and take the lead in designing and testing improvements in our data collection procedures. The problem is a long-standing one, and the search for solutions continues.

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Reference Service Statistics & Assessment

Survey Results

Most libraries have been gathering some sort of data on reference transactions for decades. This venerable practice has gained renewed attention in recent years as many academic libraries have experienced a sharp reduction in the number of transactions recorded. The cause and meaning of this widespread occurrence has sparked considerable discussion in the profession.

The intent of this SPEC survey is to document how ARL member libraries are collecting, using, and perhaps modifying their data on reference service transactions. It is hoped that the survey results not only will reveal current best practices, but also stimulate reflection on the most effective methods for recording and assessing the reference encounter.

For the purposes of this survey, a reference transaction is an information contact that involves the knowledge, use, recommendations, interpretation, or instruction in the use of one or more information sources by a member of the library staff. The transaction can take place at a reference desk, via online chat, individual consultation, mail, or telephone. It does not include simple directional questions, bibliographic instruction presentations to groups, or database and Web site usage.

This survey was designed by Eric Novotny, History Librarian, Pennsylvania State University.

Please submit this survey and send the requested documentation by **June 11, 2002**. As always, individual responses to the survey will be treated confidentially.

Note: Seventy-seven of the 124 ARL member libraries (62%) responded to the survey.

Background

1. In the chart below, please indicate which method(s) your library uses to receive and answer patron's reference questions, what level of staff is used, and how many hours the service is staffed in a typical week. Check all that apply. (n=77)

Service Type	Staff Type		
	Librarian	Support Staff	Student Staff
Reference Desk	76	63	41
Telephone	73	66	41
Email	75	40	5
Web form	52	25	4
Online chat	42	23	6
Mail	69	28	2
Appointment	69	12	0
Other	4	3	1

Please describe

Other ways that reference service is offered include drop-in consultations, fax, and Web-based FAQs. Several respondents indicated that virtual reference service would be added soon.

Service Type	Hours Staffed					
	n	Minimum	Maximum	Mean	Median	Std Dev
Reference Desk	70	9	606	104.1	80.0	105.4
Telephone	64	12	458	93.6	82.0	70.0
Email	56	2	383	67.4	45.0	56.0
Web form	35	2	168	59.8	42.5	37.2
Online chat	35	10	95	34.2	22.0	24.6
Mail	34	1	155	46.9	40.0	25.9
Appointment	37	2	310	55.7	40.0	52.8
Other	3					

Please describe

A number of respondents indicated that hours varied widely across service points and from semester to semester. Estimates were provided based on averages across service points, or by using figures for the "main" service point.

2. What techniques does the library use to evaluate the effectiveness of reference service? Check all that apply. (n=77)

Track the number of reference transactions	74	96%
User surveys	43	56%
LibQUAL+ survey	39	51%
Conduct focus groups	23	30%
Interview patrons periodically	14	18%
Wisconsin-Ohio Reference Evaluation Program survey	5	7%
Other	12	16%

Please describe

Respondents reported using the following additional methods to evaluate reference services:

Online and paper suggestion forms/boxes

Analysis of records of e-mail and chat activities

Informal discussions with faculty and students

Following up with patrons at the reference desk ("Did you find everything you needed?")

Observation of staff at the desk

If your library currently tracks the number of reference transactions, please complete the survey. If not, please submit the survey now.

Reference Transaction Data Collection Process

3. How are reference transactions recorded? Check all that apply. (n=76)

Manual tally (tick marks on a piece of paper)	75	99%
Software for chat reference tracks transactions	32	42%
Online data entry form	19	25%
Clicker or other hand-held counter	3	4%
Other	6	8%

Please describe

Several respondents indicated that e-mail transactions are manually counted, others have automated the process, and/or record the e-reference questions in a database. Some use software to track hits on subject Web pages. Others review telephone records.

4. At which times during the year are reference transactions recorded? (n=76)

Regularly throughout the entire year	39	51%
Regularly during academic sessions	2	3%
Once a year during a designated "sample week"	1	1%
During a sample month	1	1%
A combination of the above methods (e.g., some data is collected throughout the year, while other data is collected only during sampling periods)	27	36%
Please describe		
Other	6	8%
Please describe		

Respondents reported a variety of methods within their institutions with some service points using sampling while others collected statistics throughout the year. Many reported using sampling for recording desk activity, while recording all e-mail and chat transactions. Some use specialized forms as needed to track particular issues.

5. If the library records reference transactions for longer than a sample week (i.e. locally designated week for ARL annual statistics), what are the reasons? Check all that apply. (n=71)

Need data over a longer period of time (semester, entire year, etc.)	56	79%
Concerned about the accuracy of projecting annual statistics based solely on activity recorded during a single week	50	70%
Need more detailed information about types of questions asked	25	35%
Need to record other types of activities (computer troubleshooting, referrals to other units, etc.)	20	28%
Need more detailed information about patron demographics (gender, academic status, etc.)	5	7%
Other	11	16%

Please describe
History or tradition
Need to collect regular data to monitor and adjust staffing levels
Track variations in the demand for reference services
Measure performance
Track the length of time to answer questions

6. For which of the following activities are transactions routinely recorded? Check all that apply. (n=76)

Reference questions asked at a reference desk	75	99%
Telephone inquiries made to the reference desk	72	95%
E-mail questions sent to a library service point	67	88%
Individual reference appointments	59	78%
E-mail questions sent directly to individual staff members	56	74%
Reference questions asked at another service point (e.g., circulation, media)	48	63%
Telephone inquiries made directly to individual staff members	47	62%
Mailed reference questions	45	59%
Chat reference questions	40	53%
Office Hours	12	16%
Use of research guides/user aids on the library's Web site	10	13%
Other	1	1%

Please describe

Records of other activities were made, but not routinely included in the reference counts.

7. What information about reference transactions is recorded? Check all that apply. (n=76)

Date	68	89%
Type of question (reference, referral, troubleshooting, etc.)	68	89%
Time of day	63	83%
Location of transaction (desk, phone, email, etc.)	60	79%
Amount of time needed to answer the question	33	43%
Patron status (affiliated, visitor, faculty, staff, etc.)	17	22%
Question subject category (psychology, history, etc.)	10	13%
Difficulty of question	9	12%
Other patron demographics	8	11%
Level of staff answering the question	6	8%
Adequacy of response	2	3%
Other	7	9%

Please describe

Some libraries reported collecting demographic or other data only for e-mail and chat transactions.

Individual units within a library recorded additional information when doing special studies.

Other data recorded:

Questions about equipment (printers), and software (Excel, PowerPoint).

School or department

Campus location

8. Some libraries have reported a strong correlation between the number of people in the library and the amount of reference activity recorded. Has your library used other measures (e.g. gate counts, head counts, etc.) in place of recording reference transactions? (n=76)

Yes	11	15%

Please describe
Gate counts and headcounts of people in the building were listed as measures used. In several cases it was indicated that these were used to supplement, not in place of, gathering reference statistics.

No, have never considered it	56	74%
No, considered it but decided against it	9	12%

Please explain
Collect *both* gate counts and reference statistics and are not planning to replace reference statistics with gate counts.
Problems collecting accurate counts automatically.
Measures of people in the building not a strong predictor of reference activity.
Gate counts would not correlate with e-mail/chat reference.

9. In the last three years, has the library made any significant changes to the way reference transactions are recorded? (n=76)

Yes	36	47%

Please describe
Going from sampling to day-to day
Going from daily statistics to sampling
Recording off-desk activity (reference consultations, e-mail, chat)
Simplifying statistics form, reducing categories
Adding categories for things like help with software, computer support

No	40	53%

10. Is the library considering future changes in the way reference transactions are recorded? (n=76)

Yes 40 53%

Please describe
Yes, in the sense that we are always reviewing current practices, considering ways to improve.
Implementation of new services (chat, courseware) will require review of current practices.
We want to find a way to gather more accurate data, standardize data collection across service points.
Want to automate data collection process (online system for recording reference transactions)

Respondents are also considering:
Sampling
Gathering more data (patron demographics, time required to answer question, complexity of question)
Assessing user satisfaction, accuracy of referrals
Collecting database usage statistics/head counts
Tracking off-desk activity
Recording usage of Web-based information resources (databases, subject guides, service forms)

No 36 47%

11. Is there a person or group in the library responsible for coordinating the collection of reference transaction data across service points? (Examples of coordinating activities might include developing common definitions for reference transactions, providing training in data collection, scheduling data collection periods, etc.) (n=74)

Yes 60 81%
No 14 19%

If yes, please indicate who is responsible for coordination (e.g., administrative unit, department, committee, individual, etc.)

Almost an equal number of respondents reported that this is the responsibility of either the Head of Reference/Public/User Services, a committee, working group or team, or the Assistant/Associate Dean/Director. In slightly fewer libraries this is the responsibility of the coordinator for statistics, planning and/or assessment.

Analysis and Use of Reference Transaction Data

12. Who is responsible for analyzing reference transaction data once they have been collected? Check all that apply. (n=76)

Library Administrator	52	68%
Reference Librarian	50	66%
Support Staff	16	21%
Computer/Statistics staff	7	9%
Development/Public Information Office	1	1%
Other	15	20%

Please describe

Other groups or individuals who use this data include various reference working groups or teams, the Management Information Services unit or manager, the ARL statistics coordinator, and library administrative groups.

13. What software is used to analyze reference transaction data? Check all that apply. (n=76)

Spreadsheet (Excel, Access, etc.)	60	79%
None, analyze manually	26	34%
Statistical Software (SPSS, SAS, etc.)	6	8%
Other	3	4%

14. How are reference transaction data used? Check all that apply. (n=75)

Contribute to national statistics on reference service (ARL, ACRL, IPEDS, etc.)	71	95%
Monitor trends in reference services	71	95%
Determine appropriate staffing levels	70	93%
Justify/determine budget allocations	25	33%
Measure the impact of changes in policies and procedures	22	29%
Analyze use of collection	17	23%
Other	8	11%

Please describe

Plan for new services.

Determine service hours.

For publication/public relations purposes.

15. How are reference transaction data disseminated? Check all that apply. (n=76)

Internal library reports	71	93%
Report to national organizations	57	75%
Please specify which ones:		
ARL, ACRL, IPEDS/ALS, CARL, AAHSL, HEGIS		
Reports to campus administrative units	32	42%
Web page	18	24%
Library newsletter	10	13%
Press release	1	1%
Other	15	20%
Please describe		
State/regional consortia, state library, annual report, Maclean's annual ranking of universities, miscellaneous library publications.		

Evaluation

16. We would like your impressions about the quality of your library's reference service assessment activities relative to your expectations. (n=73)

For each of the following statements, please:
(a) Choose one of the numbers in the first column to indicate the **minimum** performance level you consider adequate for your library to achieve;
(b) Choose one of the numbers in the second column to indicate the level of performance you **desire** from your library; and
(c) Choose one of the numbers in the third column (or N for no opinion) to indicate your **perception** of your library's actual performance level.

	The Minimum Performance Level Is:			**The Desired Performance Level Is:**			**My Perception of My Library's Actual Performance Is:**		
When it comes to...	**Mean**	**Std Dev**	**n**	**Mean**	**Std Dev**	**n**	**Mean**	**Std Dev**	**n**
Recording reference transactions	5.60	1.8	72	8.01	1.2	72	5.67	1.9	73
Analyzing reference transactions	5.35	1.7	72	7.81	1.3	72	5.18	2.1	73
Utilizing reference transaction data	5.47	1.6	72	8.00	1.1	72	5.10	2.1	73

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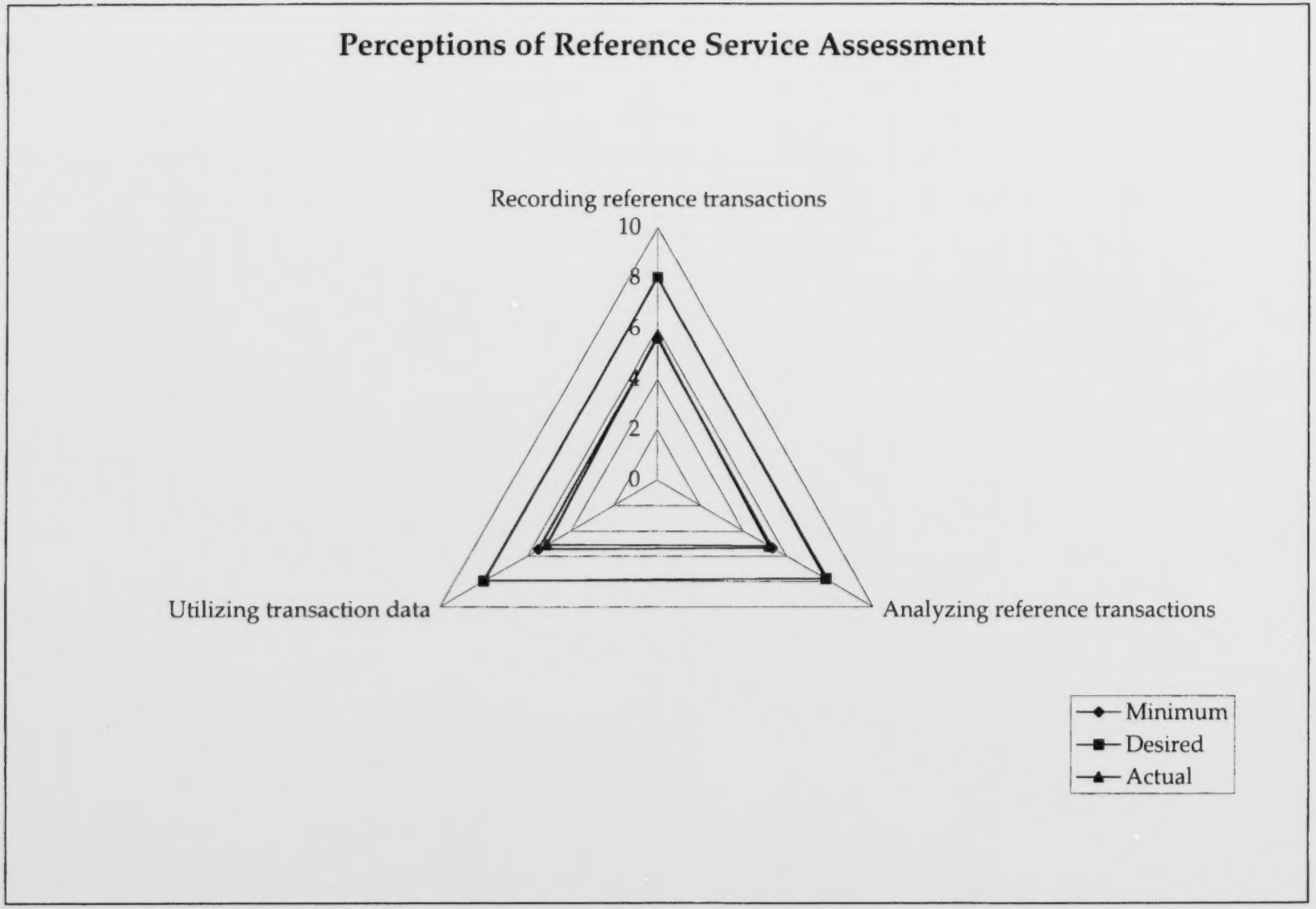
21


Perceptions of Reference Service Assessment
Recording reference transactions
10
8
6
4
2
0
Utilizing transaction data
Analyzing reference transactions
Minimum
Desired
Actual

22

17. Has your library experienced a change in the number of reference transactions (of all types) over the past three years? (n=76)

Decreased	59	78%
Increased	10	13%
About the same	7	9%

If there has been a change, to what do you attribute this change?

Use of other services has grown (e-mail, chat).
Getting more difficult questions, each takes more time.
Ready reference information (addresses, phone numbers, etc…) is on the Web, users do not need to contact the library with these questions.
Users believe they can find everything online, no need to use library resources/services.
Have not yet developed methods/procedures for adequately recording non-desk activity.
Greater information literacy, attendance at library instruction sessions.
Changes in recording reference desk transactions.
Users able to search for information independently, find resources online without using the library.
More library resources online (e-journals, online subject guides, FAQs).
Change in nature of undergraduate assignment, less emphasis on the scholarly research paper, decrease in the number of classes requiring research and writing.
Library databases/resources easier to use, (library has done a good job making resources available).

Additional Comments

18. Please submit any additional information regarding the collection, use, or dissemination of reference transaction data at your institution that may assist us in accurately analyzing the results of this survey.

A number of respondents commented on how hard it is to collect and analyze reference statistics in large, complex organizations where policies and practices vary across service points. Some are currently re-evaluating their statistics gathering approach. One library is in the process of improving the uniformity of data collection and building a central Data Farm repository for reference and instruction data.

Responding Institutions

University of Alabama
University of Alberta
Arizona State University
Auburn University
Boston College
Brigham Young University
University of British Columbia
University of California, Davis
University of California, Irvine
University of California, Los Angeles
University of California, San Diego
Canada Institute for Scientific and Technical Information
Case Western Reserve University
University of Chicago
University of Connecticut
Cornell University
Duke University
University of Florida
Florida State University
George Washington University
University of Georgia
University of Guelph
University of Houston
University of Illinois at Urbana-Champaign
Indiana University
University of Iowa
Iowa State University
Johns Hopkins University
Kent State University
University of Kentucky
Université Laval
Library of Congress
Louisiana State University
McGill University
McMaster University
University of Maryland
University of Massachusetts, Amherst
Massachusetts Institute of Technology
University of Miami
University of Michigan
Michigan State University
University of Minnesota
National Library of Canada
University of Nebraska–Lincoln
University of New Mexico
University of North Carolina at Chapel Hill
North Carolina State University
Northwestern University
University of Notre Dame
Ohio University
Ohio State University
University of Oregon
University of Pennsylvania
Pennsylvania State University
Purdue University
Rice University
Rutgers University
University of South Carolina
Southern Illinois University Carbondale
University at Albany, SUNY
University at Buffalo, SUNY
Syracuse University
University of Tennessee
University of Texas at Austin
Texas A&M University
Texas Tech University
Tulane University
Vanderbilt University
University of Virginia
Virginia Tech
Washington State University
Washington University in St. Louis
University of Waterloo
Wayne State University
University of Western Ontario
Yale University
York University

SPEC

Representative Documents

Reference Desk Activity Logs

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Hayden Library Reference Desk Statistics

Date: _____/_____/200___

Hours	Reference	Directional
7-8am		
8-9am		
9-10am		
10-11am		
11am-Noon		
Noon-1pm		
1-2pm		
2-3pm		
3-4pm		
4-5pm		
5-6pm		
6-7pm		
7-8pm		
8-9pm		
9-10pm		
10-11pm		
11pm-Midnight		

Day of week (circle or highlight one):

M Tu W Th F Sa Su

Session (indicate one):

Holiday
Summer Session I
Summer Session II
August Intersession
Fall Semester
Winter Intersession
Spring Semester
Spring Break
May Intersession

Reference transactions:

Any **In-person*** information contact that involves the knowledge, use, recommendation, interpretation or instruction in the use of information sources in any format by a member of the library staff. It also includes referral services. If a contact involves both reference and directional services, it should be reported as one reference transaction.

Directional transactions:

Any **In-person*** information contact that facilitates the use of the library but does NOT involve the knowledge, use, recommendation, interpretation or instruction in the use of information sources – except those which describe the library (e.g., schedules, floor plans or policy statements). It also includes giving assistance of a non-bibliographic nature with machines.

* Do not record telephone contacts. Rev. 7/19/01

ARIZONA STATE UNIVERSITY

Desk Reference Transactions Log

Desk_____ Name_____

Date:_____ Day:_____

Hour	<1 min.	1 - 5 min.	6-15 min.	16 - 30 min.	31> min.

Directions:
Please write the date and the time you are at the desk. For each **In House query**, record a slash (/) in the appropriate column to indicate the approximate time spent, rounding to the nearest minute, and transaction type. Telephone transactions will be marked with a "T" in the appropriate column and will include time spent off the phone to locate the answer. Email will be marked with an "E" in the appropriate column and will include time spent to locate the answer. Collaborative work done on a question will be marked with a "C". Maintenance of computers, printers or copiers will be marked with a "M" and will include time spent on the problem.

Date:_____ Day:_____

Hour	<1 min.	1 - 5 min.	6-15 min.	16 - 30 min.	31> min.

Date:_____ Day:_____

Hour	<1 min.	1 - 5 min.	6-15 min.	16 - 30 min.	31> min.

Date:_____ Day:_____

Hour	<1 min.	1 - 5 min.	6-15 min.	16 - 30 min.	31> min.

Date:_____ Day:_____

Hour	<1 min.	1 - 5 min.	6-15 min.	16 - 30 min.	31> min.

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STATISTICS WEEK RECORD SHEET April 8-14, 2002

Library Unit _____ **Reference Desk** ☐ **or Person** _____

		Directional (Record time in minutes)			Reference (Record time in minutes)		Referral	Subject	Student	Fac/Staff	Public
Date	**Question (very brief summary and/or type of question)**	Library Material	Information	Equip	Known Item	Topical		See codes on back			

UNIVERSITY AT BUFFALO, SUNY

(3/20/02)

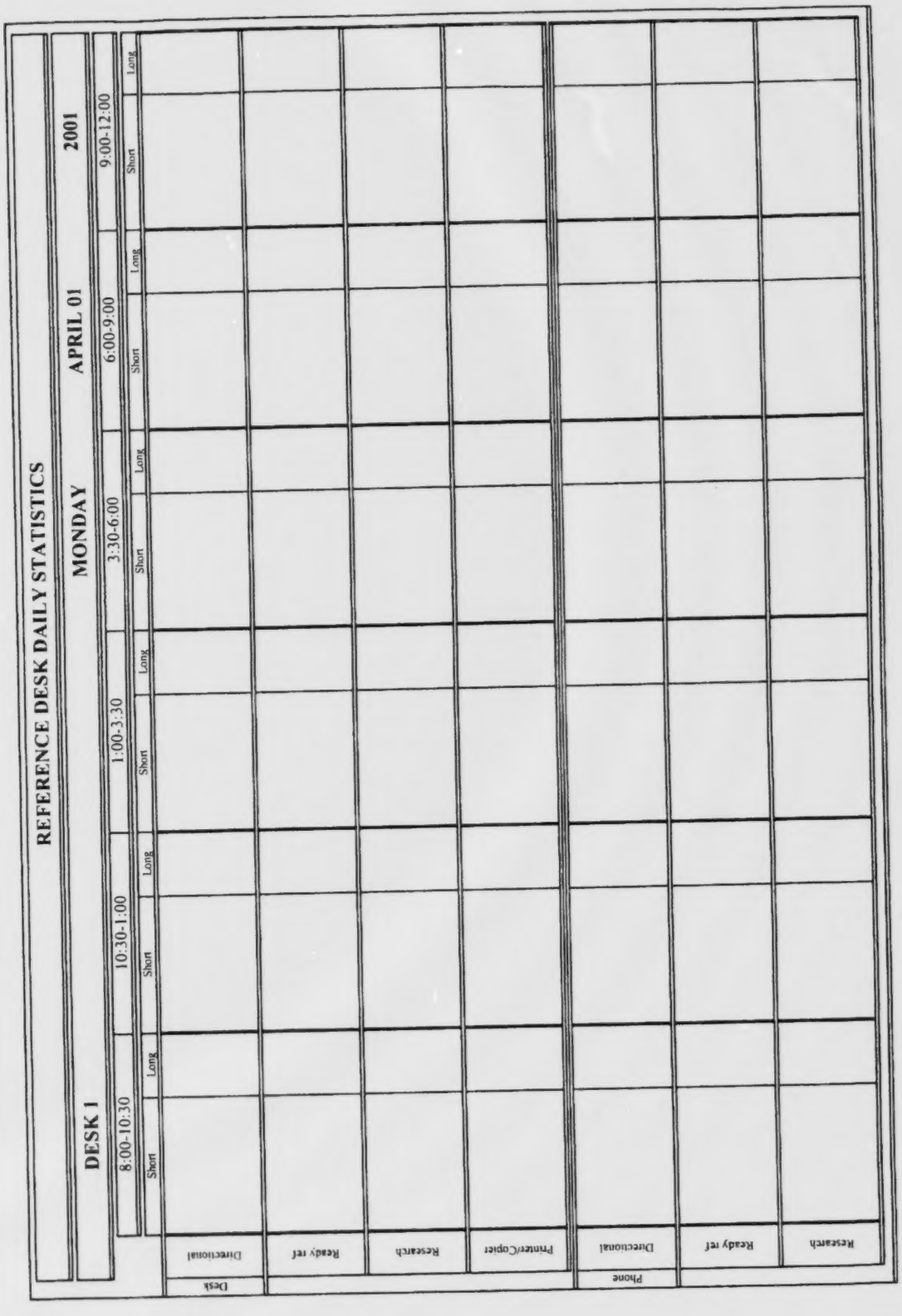
Subject Areas (assigned on basis of question topic, not dept. affiliation of patron)

	Code	Notes
African American Studies	AAS	Includes African Studies
American Studies	AMS	
Anthropology	APY	
Architecture & Planning	ARC	
Art/Art History	ART	
Asian Studies	AS	Includes Japanese Studies
Athletics	ATH	
Biological Sciences	BIO	
Business/Management	BUS	
Chemistry	CHE	
Classics	CL	Greco-Roman Civilizations, Latin and Greek literature
Communication	COM	
Communicative Disorders & Science	CDS	
Computer Science & Engineering	CSE	
Economics	ECO	
Education	EDU	
Engineering Sciences	ENS	
English	ENG	Includes English and American literature; citation manuals and style guides
General (non-academic)	GEN	e.g. entertainment, travel, job search
Geography	GEO	
Geology	GLY	
Health Related Professions	HEA	Includes **nursing**, nutrition, occupational & physical therapy, clinical lab services, etc.
History	HIS	
Latina/Latino Studies	LLS	
Law (Jurisprudence)	JLS	
Library & Information Studies	LIS	Includes Library Skills Workbook
Linguistics	LIN	
Mathematics	MTH	
Media Study	DMS	
Medicine, Dental & Biomedical Sci	MED	
Modern Languages & Literature	MOD	Non-English, includes comparative literature
Music	MUS	
Pharmacy/Pharmacology	PHM	
Philosophy	PHI	
Physics	PHY	
Polish Studies	PS	
Political Science	PSC	
Psychology	PSY	
Religious studies	RSP	Includes Judaic Studies
Social Work	SW	
Sociology	SOC	
Theatre and Dance	TH	
Women's Studies	WS	

Reference Statistics

Date _____

Time	**Info / Check-in / Fix :** Take ID, fix things, give directions, sign-up, locate book / web site asked for by title, show print & download	**Reference:** Use Ready Ref to answer question, Check LOLA, suggest book / database, formulate search statement, how to search web	**Research Strategies:** Extended time search with one person, many related questions in one transaction (this is a reference subset)
7:15-8			
8-9			
9-10			
10-11			
11-12			
12-1			
1-2			
2-3			
2-4			
4-5			
5-6			
6-7			
7-8			
8-9			
9-10			
10-11			
11-12			



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Books shelved_____

FINE ARTS STATISTIC SHEET FOR_____

	8a--12p	12p--5p	5p--7p	7p--10p	10p--12a	Totals
Non-Reference Questions						
Reference Questions						
Reserve Items Checked Out						
Technical Assistance						
Pictures Checked Out						
Pictures Filed						
Other Shelving						

Simple/quick – "where is/are"... photocopiers, restrooms, phones, change machines...
Patron is already on his/her way – needs direction
About a minute

Medium difficulty - look up a fact – you know best source immediately
Recommend a database or print source
Show library's home page or Fast Track
"Where would I find..." "I have an assignment, how do I..."
2 – 5 minutes

Difficult - instruct patron in database use/search strategy
Consult multiple sources – print and/or electronic
In-depth reference searching
Off-desk reference – including phone, email, office
More than 5 minutes

	Simple	Medium	Difficult
8-9am			
9-10am			
10-11am			
11am-noon			
Noon-1pm			
1-2pm			
2-3pm			
3-4pm			
4-5pm			
5-6pm			
6-7pm			
7-8pm			
8-9pm			
9-10pm			
10-11pm			
11pm-midnight			

DATE _____

	QUESTIONS			TELEPHONE QUESTIONS				OTHER	TOTAL
Time	General Information & Directional	Quick Reference	Research 15+ minutes	General Information, Directional & Transfers	Holdings - Catalog lookup	Quick Reference	Research 15+ minutes	E-Mail & Letters	
8-9									
9-10									
10-11									
11-12									
12-1									
1-2									
2-3									
3-4									
4-5									
5-6									
6-7									
7-8									
8-9									
9-10									

SYRACUSE UNIVERSITY LIBRARY

LOCATION _____ ***DATE*** _____

	QUICK REFERENCE			EXTENDED REFERENCE			VERY EXTENDED REFERENCE			PROXY	DIRECTIONAL			MECHANICAL
	in-person	phone	email	in-person	phone	email	in-person	phone	email		in-person	phone	email	
8 to 9														
9 to 10														
10 to 11														
11 to 12														
12 to 1														
1 to 2														
2 to 3														
3 to 4														
4 to 5														
5 to 6														
6 to 7														
7 to 8														
8 to 9														
9 to 10														
10 to 11														
11 to 12														
Total														

Total Reference/Proxy **Total Directional/Mechanical**

NOTE: Extended reference=5-15 minutes; Very extended reference=over 15 minutes

1/01 jab/rev. 24je02emc

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SYRACUSE UNIVERSITY

Perry-Castaneda Library
Reference Statistics Form

Date: MAR 03 2001

Daily: ☐ Monthly: ☐ (Please check one)

Instructions: Count each question. Place the hash mark in the box indicating how you responded. For example, if you received the question by phone, and responded by e-mail, place the mark in the e-mail column.

	Telephone	In Person	Mail	E-mail
Direction location of rooms, people, copiers, books, business services, etc				
Technical Assistance routine maintenance/problem solving for computers/software IF accounts, registration, etc				
Quick Answer phone numbers, web addresses, easy statistic, definitions, etc				
Instruction Explaining the use of electronic or print reference tools/catalogs, use of user guides, how to find journals, etc				
Extended Reference finding information for/with the user; taking 15+ minutes				
Referral sending to another library, subject specialist, etc				

UNIVERSITY OF TEXAS AT AUSTIN

DAILY REFERENCE STATISTICS

DATE: _____

DAY: _____

TIME	DIRECTIONAL	REFERENCE	REFERRALS	SECURITY	PC'S FULL
7:30-9:00					
9:00-10:00					
10:00-11:00					
11:00-12noon					
12noon-1:00					
1:00-2:00					
2:00-3:00					
3:00-4:00					
4:00-5:00					
5:00-6:00					
6:00-7:00					
7:00-8:00					
8:00-9:00					
9:00-10:00					

PATENT QUESTIONS:

_____

_____

_____

_____

_____

_____

10/09/01

PORTER INFORMATION DESK

REFERENCE QUESTION RECORD

DATE _____

	9-10	10-11	11-12	12-1	1-2	2-3	3-4	4-5	6-7	7-8	8-9
SIMPLE QUICK RESPONSE : eg. TRELLIS, QUICK REF., ABBREVIATIONS, HANDBOOKS											
COMPLEX TAKING PATRON THROUGH A SEARCH/PROVIDING INSTRUCTION : eg. HOW DO I FIND JOURNAL ARTICLES ON TOPIC X											
DIRECTIONAL DIRECTING PATRON, WITHIN THE LIBRARY, TO eg. CALL #, RESERVES, STAPLER, COPY CENTRE											
REFERRAL NOT COMPLETING, BUT FILTERING THEIR LIBRARY INFORMATION NEED : eg. REFERRING PERSON TO ANOTHER INFORMATION DESK PERSON/SERVICE, ETC.											
COMPUTER PROBLEMS ADDING PAPER, REBOOTING, CALLS TO SYSTEMS, ETC.											

SYSTEMS PROBLEMS REPORTED TO HELP DESK	FIXED

Other Reference Activity Logs

Off-Desk Transaction Log

Employee_____ Month_____

Date	<1 minute	1 - 5 minutes	6 - 15 minutes	16 - 30 minutes	31 - 60 minutes	>60 minutes	Referral

Directions: Please record the approximate time spent, rounding to the nearest minute, answering reference queries when you were not working at the reference desk. Include telephone, collaborated, email and maintenance questions. To differentiate among queries use "T" for telephone, "C" for collaborative, an "E" for email . "O" for chat reference and "M" for maintenance queries.

Statistics

E-MAIL REFERENCE

5/24/02

Date	Faculty	Student	Staff	Other	Subject	Initial question answered via e-mail	Time Spent Answering Question	Total number of e-mails sent before resolved	Ready Reference	Extended Reference	Directional/Services	Other	Comments

GEORGE WASHINGTON UNIVERSITY

Telephone Reference Statistics

Date _____

Time	**Info / Check-in / Fix :** Take ID, fix things, give directions, sign-up, locate book / web site asked for by title, show print & download	**Reference:** Use Ready Ref to answer question, Check LOLA, suggest book / database, formulate search statement, how to search web	**Research Strategies:** Extended time search with one person, many related questions in one transaction (this is a reference subset)
7:15-8			
8-9			
9-10			
10-11			
11-12			
12-1			
1-2			
2-3			
2-4			
4-5			
5-6			
6-7			
7-8			
8-9			
9-10			
10-11			
11-12			

Individual Research Consultation (Request for Information; Ask a Librarian; LivePerson; Off-Desk Contact)

Librarian:								
Patron contact information – name, phone, e-mail address, or mail address (Optional):								
Initial date of contact:			**Level of urgency:**			**Estimate of time spent:**		
Method(s) of contact: (Check all that apply)	Phone	Ref Desk	In Person	E-mail	Live Person	Fax	Note	Ask A Librarian
Method(s) of response: (Check all that apply)	Phone	Ref Desk	In Person	E-mail	Live Person	Fax	Note	Ask A Librarian
Consultation/Instruction (dates optional):			**Provision of Information (dates optional):**					
Patron category:	Faculty	Staff	Graduate	Undergraduate	4 College	No affiliation		
Topic:								
Sources consulted (optional):								

R:\Ref Office Manager\Statistics & Monthly Reports\TEMPLATES Reference Daily and Monthly Report Forms\TEMPLATE Individual Research Consultation (Request for Information).doc

Statistics: Weekly Personal Data Sheet

Librarian Name: _____

Week Beginning: July 15, 2002

REFERENCE QUESTIONS
(Please make a mark for each occurrence of the following.)

Reference Questions off the desk
(includes phone, e-mail and office drop-in)
_____

Consultations in excess of 30 minutes
_____

BIBLIOGRAPHIC INSTRUCTION SESSIONS

Number of Sessions	*Number Attending*
_____	_____

Please return to the Reference Office at the end of the week. Thank you.

Telephone Reference Data

Date: _____ Day: _____

TIME	Reference	Transfer to a Librarian	Transfer to a Library Instruction Librarian	Transfer to another DEPT in Library	Transfer to another DEPT on Campus	Wrong Number/ Calls looking for someone	Calls for Librarians or staff but no message left	Took Message for Librarians or Staff	Student Assistant call ins
7:30-8:00									
8:00-9:00									
9:00-10:00									
10:00-11:00									
11:00-12noon									
12noon-1:00									
1:00-2:00									
2:00-3:00									
3:00-4:00									
4:00-5:00									
5:00-6:00									
6:00-7:00									
7:00-8:00									
8:00-9:00									
9:00-10:00									
10:00-11:00									
11:00-12mid									
12mid-1:30									

TEXAS TECH UNIVERSITY

WEEK _____ DEPARTMENT/LIBRARY _____ LOCATION_____

QUESTION TALLY SHEET

During this week record on this sheet all questions asked by patrons and library staff, regardless of where you were when the question was asked (reference desk, hallway, stacks,etc.).

If you are unable to record the question immediately, please do so **as soon as possible**. If you do not remember exactly how many of which type of questions to mark down, **DO NOT GUESS**.

Please refer to the attached information contact definition sheet for full definitions of reference and directional questions.

REFERENCE QUESTIONS	**EQUIPMENT SUPPORT**	**DIRECTIONALQUESTIONS**
How do I find this book (specific title or call number, a current journal, information on my subject in a journal article? How do I use LEXIS/NEXIS, etc.	The photocopier needs paper. Help me with a printer jam, load microfilm on the reader, adjust the sound on the VCR, print from my laptop?	Where is John Smith's office, the restroom), 5M, Clemons Library or any other physical/geographical location ? Where is the stapler?
MONDAY____	MONDAY____	MONDAY____
TUESDAY____	TUESDAY____	TUESDAY____
WEDNESDAY____	WEDNESDAY____	WEDNESDAY____
THURSDAY____	THURSDAY____	THURSDAY____
FRIDAY____	FRIDAY____	FRIDAY____
SATURDAY____	SATURDAY____	SATURDAY____
SUNDAY____	SUNDAY____	SUNDAY____
WEEKLY TOTAL_____	**WEEKLY TOTAL** _____	**WEEKLY TOTAL**_____

SPEC Kit 268
Reference Service Statistics & Assessment

Definitions/Guidelines/Procedures

Directions for the **Statistics Week Record Sheet**

Library Unit – Use UGL, SEL, LML, Bus/Docs or APL not Arts & Sciences Libraries.

Reference Desk -- Check this box if the form comes from the reference desk. Collection of statistics is not limited to the desks during Reference Statistics Sampling Week. People will be using these forms in their offices.

Person – Put your name on the forms you use in your office for walk-in, phone, e-mail and Instant Librarian type reference.

Date -- One date per day is sufficient.

Question -- What you write about the question doesn't have to be elaborate but this box does have to be filled in. Why? Because it is our best assurance that we are collecting accurate statistics not just tally marks.

Time Spent -- Use the timer provided. Press **Start** to begin the count. Press **Stop Reset** when you are finished with the question. Round the number up to the next whole minute. For example: if the display reads 02 26, record the time spent as 3. Then press **Stop Reset** again to clear the display.

Directional [official definition] *A directional transaction is an information contact that facilitates the use of the library in which the contact occurs, and which does not involve knowledge, use, recommendation, interpretation, or instruction in the use of any information sources other than those that describe the library, such as schedules, floor plans, handbooks, and policy statements. Examples of directional transactions include giving instruction for locating, within the library, staff, library users, or physical features, and giving assistance of a non-bibliographical nature with machines.* [from ANSI/NISO Z39.7-1995 "Library Statistics"]

Directional -- Library Material Record here the time spent searching for books not on the shelf, going to the stacks with a person who has a call number, describing how to get to the periodicals, etc.

Directional – Information Record here the time spent on directional transactions which do not relate to library materials or equipment problems.

Directional – Equipment Record here the time spent clearing paper jams, fixing printer queues, demonstrating the features of microform printers, finding more staples, rebooting computers, helping people logon to BISON, etc.

Reference [official definition] *A reference transaction is an information contact that involves the knowledge, use, recommendation, interpretation, or instruction in the use of one or more information sources by a member of the library staff. The term includes information and referral service. Information sources include: (a) printed and nonprinted*

materials; (b) machine-readable databases (including computer-assisted instruction); (c) the library's own catalogs and other holdings records; (d) other libraries and institutions through communication or referral; and (e) persons both inside and outside the library. When a staff member uses information gained from previous use of information sources to answer a question, the transaction is reported as a reference transaction even if the source is not consulted again. [from ANSI/NISO Z39.7-1995 "Library Statistics"]

Reference – Known Item Record here the time spent determining whether the libraries own a particular item, latest date of receipt, what the call number is, alternative locations, etc.

Reference – Topical Record here the time spent showing people how to use databases, searching for articles or books on a topic, finding facts, recommending sources and search strategies, etc.

Referral -- Check here if you end up referring a question to another library or reference desk.

Subject -- Use the codes provided to indicate the broad academic area of the question. This is tricky. The code is not necessarily the same as the person's major. An anthropology student could be asking a Modern Languages and Literature question. A management student could be asking an engineering question. One guideline is to base the code on the call number of the resources used to answer the question. Citation manuals and style guides, whether APA or MLA, are coded ENG for English. Library Skills Workbook assistance is coded LIS for Library Studies. Not all questions will have a subject orientation, so completing this field is not required. Note, however, that there is a code, GEN, for general "public library" type inquiries. It is possible that some directional transactions will have subject content that can be coded here.

Student -- Make a check mark in this column for UB students either undergraduate or graduate. High school students and students from other universities are included under "Public." If unsure, explain that we are gathering statistics for just one week and ask the patron politely for their status.

Fac/Staff -- Check here if the person asking the question is a UB faculty member or person employed by the university even if that person is clearly doing research for a class they are taking.

Public -- Check here if the person is from the community, a student elsewhere, or a professor elsewhere.

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contents

Reference departments & programs

Public Services Leadership Team, teams & liaisons

Reference forums & events

staff

tools & resources

Public Services home page

Last updated: May 30, 2002

Comments or suggestions? Askaway!

Public Services Division

Statistics & Surveys

PUBLIC SERVICES STATISTICS DEFINITIONS
(Revised March 2000)

DIRECTIONAL Transactions 1
A directional transaction is an information contact that facilitates the logistical use of the library and that does not involve the knowledge, use, recommendations, interpretation, or instruction in the use of any information sources other than those that describe the library, such as schedules, floor plans, handbooks, brochures, policy statements, etc.

Examples of DIRECTIONAL transactions are:

- directions to the library and library hours
- directions for locating facilities such as restrooms, copiers, phones, etc.
- directions for locating library staff and services
- directions for locating materials for which the user has a call number (call number locations)
- supplying materials such as paper and pencils
- assisting with, and instructing users on the operations of machines, i.e., copiers, microfiche readers, regenerators, printers, etc.

Count persons not questions asked. Directional assistance provided as part of a reference transaction should not be counted here.

HOLDINGS CHECKS (Reference Transactions) 2
A holdings check transaction is an information contact that involves checking the ANTPAC, MELVYL, or other catalogs to locate a particular source for which the user has an author or title.

Count persons not questions asked. If the inquiry extends beyond a simple holdings check, count as a ALL OTHER REFERENCE transaction.

ALL OTHER REFERENCE (Reference Transactions - Desk)3
Information contacts that occur at the desks that involve the knowledge, use, recommendations, interpretation, or instruction in the use of one or more information sources by a member of the library staff. Information sources include printed and non-printed materials, machine-readable databases (including computer-assisted instruction), catalogs and other holdings, records and, through communication or referral, other libraries and institutions, and persons both inside and outside the library. A contact which includes both reference and directional service is counted as one reference transaction. Duration should not be an element in determining whether a transaction is a reference transaction. Count all reference transactions except holding checks and database searches that incur direct costs (these are recorded under Holdings Checks and Database Searches). Count number of persons or interviews, not each question asked.

RESEARCH CONSULTATION SERVICE (RCS) TRANSACTIONS
Contacts that occur during formal RCS service hours that meet the criteria described above for Reference Transactions (Desk). Count each individual session as one reference transaction.

ELECTRONIC REFERENCE SERVICE (ERS) TRANSACTIONS
Contacts that are submitted to a web-site or e-mail address that have been established for the purpose of receiving such questions. Contacts must meet the criteria described above for Reference Transactions (Desk). Examples are askref@uci.edu, libraries@uci.edu, http://sun3.lib.uci.edu/~slriweb/rqform.htm, etc. Do not record electronic contacts directed to individual librarians here.

OFF-THE-DESK REFERENCE TRANSACTIONS
Contacts that meet the criteria described above for Reference Transaction (Desk) that are directed to an individual librarian. These transactions occur "off-the-desk" and are made either by telephone, mail, e-mail, web, or by a direct, in-person interaction between the user(s) and individual librarian.

Database Searches
A database search is a reference transaction that involves a search of an on-line database for the purpose of obtaining either specific factual information or a list of citations on a subject. Database searches include:

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- Subsidized ready reference searches (searches that incur a direct cost such as DIALOG, STN searches, etc.)
- Charged/recharged searches to users (searches that are performed for a fee on either a fee-for-service basis or recharged to another campus unit.

Ready reference searches that do not incur a direct cost and that are provided in the course of a reference transaction are not counted here (examples include Melvyl and Internet searches).

Count each distinct topic as one search, not the number of databases searched.

Group Presentations
Group presentations are formal educational sessions for groups. Group presentations include bibliographic instruction programs and other planned class presentations. Presentations to groups may be for either bibliographic instruction, cultural, recreational, or educational purposes.

Count total number of discreet presentation sessions. If the library sponsors multi-session or credit courses that meet several times over the course of a semester, each session should be counted. Presentations both on and off the premises should be included as long as they are sponsored by the library. Do not include meetings/classes sponsored by other groups using library classrooms or meeting rooms. Group orientations and tours should not be recorded here.

Count total number of participants for each session that was reported above. For multi-session classes with a constant enrollment, count each person only once.

Orientations and Tours
Orientations and tours are educational sessions for individuals and groups that are designed to introduce new library users/visitors to the collections, services, and facilities of the library. Count total number of orientations/tours and total number of participants for each session. Group presentations should not be recorded here.

Contact Hours for Presentations
(Revised June 1996)
Count one contact hour for every one-hour session (group presentations only); a two hour session with one instructor counts as two contact hours. Multiple instructors at a single session are counted as one instructor; a four-hour session with two instructors counts as four contact hours.

Instructional Lab Statistics
(Computer lab definition revised June 1996)
Count total number of scheduled individual uses of machines by library users in "open" instructional lab environment (computer check-outs).

REFERENCE STATISTICS COLLECTION PROCEDURES

Statistics for Directional Transactions, Holdings checks, and Reference transactions (desk) are kept on a log on the reference desk. The sheets are collected from the desk by the department record-keeper and incorporated into the monthly R&I statistics.

RESEARCH CONSULTATION SERVICE (RCS) TRANSACTIONS statistics are kept on the sign-up/in log and are transferred to the monthly statistics sheets by the department record-keeper. The sheets are collected periodically by the record-keeper and for accurate statistics, the "no shows" should be indicated on the log. Each individual session is on reference transaction.

ELECTRONIC REFERENCE SERVICE (ERS) TRANSACTIONS statistics are maintained on a monthly log by the person who is responsible for checking and responding to the web site or e-mail address that has been established for the purpose of receiving such questions. The log with a tally (hatch mark) for each transaction during the month will be collected by the Department record-keeper at the end of each month and a new form posted. The log will be kept posted near the computer used by the person responsible for responding to the messages.

OFF-THE-DESK REFERENCE TRANSACTIONS statistics are kept by individual librarians on a log in their offices. The statistics will consist of hatch marks each representing one off-the-desk reference transaction that involves either a mail, telephone, e-mail, Web, or direct in-person interaction between a user and the individual librarian. Record-keeper will collect the forms each month from each librarian. The record-keeper will play a role in communication, collecting, and follow-up with these forms.

New forms will be distributed each month. The record-keeper will incorporate these statistics into the monthly R&I statistics.

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1 Directional transaction definition revised June 1996. Revision is based on current ARL, IPED and AAHSLD definitions.
2 Holdings checks definition revised June 1996.
3 Reference transactions definition revised March 1997. Revision based on current ARL, IPED and AAHSLD definitions.

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http://clics.ucsd.edu/isc/refstats.htm

UCSD Libraries Reference Statistics
Information Services Committee
Adopted by PSAC - January 5, 2000

This document provides guidelines for recording reference statistics at all UCSD Library service points. Departments must report statistics to library administration in two categories, Directional and Reference. These categories are defined below so that all units can record and report their statistics consistently, accurately, and in accordance with the Association of Research Libraries guidelines. Each unit may of course expand their reporting categories for internal use, in any way they find useful. However, when reporting reference statistics each unit will have to collapse any additional categories into Directional and Reference. At this point care should be taken that only transactions that fit each category are included there.

I. DIRECTIONAL TRANSACTIONS

A directional transaction is an information contact that facilitates the logistical use of the UCSD Libraries or the UCSD campus and does not involve the knowledge, use, recommendations, interpretation, or instruction in the use of any information sources other than those that describe the library, such as schedules, floor plans, and policies.

Examples of directional questions include:

- directions for locating facilities such as restrooms, telephones, photocopiers, etc.
- directions for locating library staff members.
- information concerning library hours and policies.
- instructions in using microform machines, photocopiers, photocopy card vending machines, etc.
- directions to book stacks when patron has call number.
- directing a patron to a requested title such as Books in Print, the Schedule of Classes, or a dictionary.
- assisting patrons with mechanical aspects of equipment such as card readers, switchboxes, "out of paper" error messages, paper jams, etc.
- directions (what we now call referrals) to reference desks.

II. REFERENCE TRANSACTIONS

A reference transaction is an information contact that involves the knowledge, use, recommendations, interpretation, or instruction in the use of one or more information sources. Information sources include (a) printed and nonprinted material; (b) machine-readable databases (including computer-assisted instruction); (c) catalogs and other holdings; (d) other libraries and institutions through communication or referral; (e) persons both inside and outside the library. When a staff member uses information gained from previous use of information sources to answer a question, the transaction is reported as a reference transaction even if the source is not consulted again.

Examples of reference transactions include:

- assisting a patron with a ready reference transaction that involves a quick lookup in a directory or encyclopedia.
- assisting a patron with verifying an ILL citation. **NOTE: multiple requests received from the same patron should be counted as a single reference transaction.**
- assisting a patron in the use of catalogs, databases, and the Internet, etc.
- assisting a patron in selecting appropriate resources for a research paper.
- interpretation, instruction in the use of a resource (print or electronic) or printing from an electronic resource. This does not include assistance merely with mechanical aspects of equipment such as card readers, switchboxes, "out of paper" error messages, paper jams, etc. [see 7th bullet under "Examples of

directional questions include:"]

· instruction on downloading to a disc which involves use of an information source such as downloading content from Current Contents, Academic Universe, JSTOR, etc.

GUIDELINES:

1) An information contact is defined as a single transaction between a staff member and a requester.

2) If a transaction includes both reference and directional components, it should be counted as one reference transaction.

3) If the question involves one or more conceptual topics: several questions may be asked and answered, and should be counted as one reference transaction. However, if a patron returns to the reference desk at a later time this would be counted as a separate reference transaction, even if the second transaction were a follow-up to the first.

4) Duration should not be an element in determining whether a transaction is a reference transaction.

5) Reference transactions which take place off-desk, e.g., callbacks, questions which require follow-up after the desk shift has ended, email, mail, telephone, or faxed questions should be counted as a reference transaction. **NOTE: Each library can decide on separate forms for individuals or one form for the department as a whole. In either case, off-desk reference transactions should be reported to Library Administration along with the reference transactions counted at the reference desk.**

6) Statistics for classes, tours, consultations, are gathered separately by individual libraries **AND SHOULD NOT** be counted as reference transactions.

7) Reference transactions that begin at the desk, but that later require off-desk consultation should be counted as a reference transaction at the reference desk. If the consultation is instructional in nature, it should be counted as an instructional transaction. **NOTE: Instructional statistics are counted on a separate form. If the consultation is how to research a topic, it should be counted as a reference transaction (see #5 above.) If the consultation involves both aspects of the above, bibliographers should make a judgement call as to where the consultation should be counted.**

8) Fee-based mediated ready reference searches should be reported as a reference transaction AND as a CARS (Computer-Assisted Reference Services) transaction. **NOTE: The CARS (Computer-Assisted Reference Services) transaction is counted on a separate form.**

UGA Libraries Reference Statistics

Statistics Categories

Machine Maintenance	
Directional	
Technology Training	
Ready Reference	
Consultation/Library Resource Training	

Definitions:

Machine Maintenance: This category includes rebooting workstations, troubleshooting applications and all manner of printing problems.

Directional: This includes providing directions to buildings on campus and points within the libraries.

Technology Training: This category is for instruction provided to students and faculty in the use of Word, Excel, PowerPoint or similar applications.

Ready Reference: This category is for quick look-ups that usually can be satisfied by using just one or two resources.

Consultation/Library Resource Training: Questions which require over five minutes to respond to should be noted here. Helping users select appropriate databases, demonstrating database features as well as training users to formulate a search strategy belong here.

Guidance in Selecting the Most Appropriate Category:

Many reference transactions fall into multiple categories. The reference librarian should choose the category that reflects the best use of their professional skills. For multiple category questions this will usually be one of the training categories. If some minutes following an explanation of how to use a database, the librarian needs to unjam a printer for the same individual, this should be counted as a separate transaction.

REFERENCE STATISTICS

Statistics will be kept on three types of patron encounters: Information questions, reference questions, and research questions. The categories are differentiated by the knowledge and skill needed to answer the queries, not by the amount of time involved. Definitions and explanations of each category follow.

To Keep in Mind

We are counting patron transactions. If an interview for a specific information need involves a number of closely related questions, these will be recorded as one question. However, if a transaction involves a number of entirely different questions, they should be counted separately. Questions involving separate transactions with the same patron will be counted separately. Also, if a patron transaction begins as an informational question and becomes a reference question, it is ONLY RECORDED AS A REFERENCE QUESTION.

1. "Scavenger Hunt" lists of reference questions will be treated as one reference encounter per question. To be counted this way, the questions must cover different subjects and be answered using varied sources.
2. In contrast, series of similar questions that may be found in the same source (3 ZIP codes, 4 telephone numbers, etc.) Count as one question, if asked in one transaction. If the patron leaves the desk and comes back with more questions, the transactions are counted separately.
3. Using multiple reference sources to find the answer to one question does not count as multiple questions.
4. If a patron is referred to a source, uses it, and the comes back with more questions, this counts as a separate transaction. When the instructions are given in one transaction, this counts as one question.

Non-Questions

These do not count in statistics at all:

1. Requests to borrow a pencil, scissors, etc.
2. Returning materials from ready reference.
3. Personal phone calls.
4. Requests for a specific librarian's office.

I. Information/Check-Out/Fix-It

General definition: Any question that does not involve professional knowledge or consultation of a reference source.

General Examples:

1. Simple statements of library or department policy (library hours, rules regarding circulation, etc.)
2. Telephone transfers and messages.

3. Questions which must be referred to another department (overdue books, ILB, etc.) If the staff member attempts to find information in reference, fails, and then refers the patron to another department, the question counts as reference.
4. Directing a patron to or personally retrieving items requested by name, including books, databases, and web sites.
5. Directing a patron to or personally retrieving items requested by generic type (a thesaurus, atlas, medical dictionary), unless because of the nature of the request the staff member finds it necessary to recommend a particular title.
6. Simple questions about filling out ILB or Search Request forms. If the patron wants more details that qualify as professional information the request becomes a reference question.
7. Directions to things in the library (pencil sharpener, restrooms, copy machines, etc) or to places on campus.
8. Looking up telephone numbers for patrons.
9. Any question which is immediately referred to another staff member. If that staff member is also at the reference desk, record the question as handled by the second staff member.
10. Requests for the staff member to locate an item that the patron cannot find on the shelf. If the patron requires bibliographic instruction, this request becomes a reference question.
11. Fixing or adjusting reference machinery, including computers and printers.
12. Directing a patron to sign up to use computer resources.
13. Showing a patron how to download or print from computer resources.

Sample Questions:

- My printer won't stop printing.
- My printer is out of paper or jammed.
- Can I get Value Line?
- I need Stat Abs.
- Where are the photocopiers?
- Where are all the M call numbers?
- My professor told me to use Compact Disclosure. Where do I sign up?
- Can you show me how to download from Lexis/Nexis?
- Will you show me how to set up my UnCover profile?

II. Reference

General Definition: Any question that involves professional knowledge and/or consultation of a reference source, except for those questions defined as research.

General Examples

1. Selecting a source for the patron and referring them to it, (both print and non-print).
2. Looking up information, including names, facts, and addresses.
3. Instructing a patron to use any print or electronic reference source.
4. Interpreting a citation for a patron, whether or not any sources are consulted.
5. Any actual staff use of LOUIS, reference books, or electronic resources.

6. Detailed explanations of library or department policies.
7. Constructing search strategies for electronic databases, or suggesting words.

Sample Questions

- Who are the U.S. Senators for Louisiana?
- What is the population of Burundi?
- I need to find a company address. What should I use?
- What is the job description of the Chief of Staff of the Air Force?
- Anything you can quickly locate in any ready ref/super ready ref book.
- I need statistics on health care for the elderly. What databases should I use?
- How can I get my friend's email address form their school over the Internet?
- How do I look for a book in LOLA?
- How do I find information on football on the Internet?
- I need to get an article through UnCover - will you help me set up my profile and then find the article?

III. Research Strategies

General Definition: Any question defined as reference that requires the staff member to help a patron construct a detailed research strategy. Generally, this may take longer than an average reference question.

General Examples:

1. Briefly introducing graduate students to print and electronic resources in their discipline.
2. Helping a patron answer a question requiring multiple resources all at once.

Sample Questions

- I need information on Maya Angelou. Can you tell me where and how to find biographical information, short stories, poems, reviews, and the text of her acceptance speech?
- I'm a new graduate student. Can you show me the relevant resources in my discipline? (If you immediately refer to a subject specialist, however, it is an informational question).
- Any series of related questions that are all asked at the same time, on which you must spend either considerable time or brain-power, on which you must consult a multitude of sources, and which you may end up referring to a subject specialist.

- Background Memo
- Frequently Asked Questions
- Fall 2002 Calendar
- Reference Sampling Form
- Results

University of Maryland Libraries Reference Transactions Sampling Plan

Background and Purpose

The Libraries are aware that staff, when busy at the service points in the library, often undercount the number of reference questions answered. The libraries are also aware that remembering to keep track of each reference question is often a burden. To assist staff in keeping track of their reference work and to alleviate some of the burden, we are proposing that reference transactions be sampled at specified times during the semester and that only staff working during those specified times be required to keep track and count all reference transactions.

While it is true that staff may spend a longer time with some transactions than others, the present counts will be strictly numeric. The results will be extrapolated to provide a total number for the year for reporting purposes to ARL, IPEDS and other national and local organizations which require or request the statistic. In addition, the sampling results can be analyzed for other reasons, including the following:

- level of use of the libraries resources
- heavily used times of service points
- heavily used service points

Sampling will take place at the following service points in the UMD Libraries:

McKeldin Library	Service Plus, Periodicals, Government Documents, Reserves, ETIC, Prange Collection, East Asia, Circulation, Rovers, Map Room & subject teams
Hornbake Library	National Broadcasting Archives, Archives & Manuscripts, Maryland Room
Nonprint Media	Reference
EPSL Library	Reference, Circulation
Performing Arts Library	Reference, IPAM, SCPA
Architecture Library	Reference
Art Library	Reference, Circulation
Chemistry Library	Reference

ONLY REFERENCE TRANSACTIONS will be counted during the sample time period. DO NOT count directional transactions during the sampling period The definition of reference transaction is the one used by the Integrated Postsecondary Education Data System (IPEDS):

A reference transaction is an information contact that involves the knowledge, use, commendation, interpretation, or instruction in the use of one or more information sources

by a member of the library staff. Information sources include printed and non-printed materials, machine readable databases (including assistance with computer searching), catalogs and other holding records, and through communication or referral, other libraries and institutions and persons both inside and outside the library. Include information and referral services. If a contact includes both reference and directional services, it should be counted as one reference transaction. When a staff member utilizes information gained from a previous use of information sources to answer a question, report as a reference transaction, even if the source is not consulted again during this transaction.

Examples of directional questions, which are not to be counted, include the following:

- Where is the _____ located?
- How or where do I find this call number?
- What does McK Ref mean and where is it?
- Where do I sign up for a library card?

Sampling Methodology

The sampling will be conducted on fourteen days - one day a week each week of the semester. This will provide a broader range of periods and will also be less burdensome on staff than a concentrated period and hopefully the results will be more statistically reliable. A calendar will be provided with the sampling days clearly marked through December. The schedule is designed to sample during 'typical' time periods, avoiding exam periods, but during a representative time. All UM Libraries will perform sampling at the same time. The sampling will be performed during all hours the libraries are open.

Transaction counts will be collected by all staff working the above service points. In addition all Rovers in McKeldin, all librarians responding to questions at their own work areas and all responses to phone and e-mail queries will be counted. All e-mail queries should be recorded upon receipt only. All completed reference sampling forms should be placed in a central location and sent to the MIS office weekly the day after the sample is completed. The MIS office will tabulate the results and provide a monthly report to PSD.

It should be noted that the purpose of sampling is to count the number of reference transactions, not the quality of reference service. The data collected will be extrapolated for yearly statistics reported to ARL. A weekly count in the fall is provided to IPEDS one day from that week will be included in the sampling.

Frequently Asked Questions (FAQs)
Reference Transaction Sampling Plan

Click on a question to get an answer!

1. Why are we switching to a sampling method?
2. How did you choose the sampling methodology?
3. How will we use these numbers?
4. Now that we are doing sampling, should I discontinue daily counts?
5. What is considered a "reference transaction"?
6. How do I handle other types of questions?
7. How do I fill out the "Reference Sampling Form"?
8. Do we need to keep track of telephone and e-mail transactions?
9. Does the duration of the transaction matter? Do I need to note this?
10. How do we count referrals?
11. I lost my Reference Sampling Form and Schedule of Sampling Days. Where can I get other copies?
12. I forgot to keep track of reference transactions during part or all of the scheduled sampling day. What do I do now?
13. Why are circulation desks included as sites to collect data?
14. Are only reference librarians required to do this?
15. What if I answer a reference question when I'm not "on the desk"?
16. What do I do with my Reference Transaction Form at the end of my shift?
17. Whom should I contact if I have questions?

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1. Why are we switching to a sampling method?

Collecting the number of reference transactions on a daily basis is a burdensome task that often gets neglected as more pressing issues demand more attention. The busier it gets in the libraries, the less likely we are to record the number of transactions. By targeting just 14 days a semester we are hoping we can focus our reference transaction tracking efforts to obtain some meaningful numbers and at the same time relieve staff of the burden of daily tracking.

2. How did you choose the sampling methodology?

The sampling methodology was developed by the Libraries' Management Information Systems Office and approved by the Library Assessment Review Committee (LARC). The plan was also reviewed by the University's Office of Information Technology Statistics Laboratory.

The sampling plan is designed to obtain snapshots of the volume of reference transactions from a broad range of periods throughout the semester. This is why the sampling days include each day of the week and are scattered throughout the entire semester. If we sampled only on particular days of the week or particular times of the semester, our estimates of the number of reference transactions for the entire semester would be less statistically reliable.

3. How will we use these numbers?

We will use the data gathered on the sampling days to create annual estimates of the number of reference transactions. This information is regularly reported to the University, various library associations, and governmental agencies. The data are also helpful for understanding the level of use of the libraries and guiding the strategic planning of library services.

4. Now that we are doing sampling, should I discontinue daily counts?

Yes! You only need to collect data on the specified sampling days.

5. What is considered a "reference transaction"?

For the purposes of this project we are using the Integrated Postsecondary Education Data System's (IPEDS) definition of reference transaction:

> A reference transaction is an information contact that involves the knowledge, use, commendation, interpretation, or instruction in the use of one or more information sources by a member of the library staff. Information sources include printed and non-printed materials, machine readable databases (including assistance with computer searching), catalogs and other holding records, and through communication or referral, other libraries and institutions and persons both inside and outside the library. Include information and referral services. If a contact includes both reference and directional services, it should be counted as one reference transaction. When a staff member utilizes information gained from a previous use of information sources to answer a question, report as a reference transaction, even if the source is not consulted again during this transaction.

Only reference transactions, as described above, will be counted during the sample time period.

6. How do I handle other types of questions?

Directional Questions
DO NOT COUNT directional questions as reference transactions. Some examples of directional questions are the following:

- Where is the restroom?
- Where are the journals located?
- Where is a photocopier?

Reserve Questions
If someone asks you for a reserve item and in order to answer it you need to consult an information source, this should be counted as a reference transaction. Similarly, if you assist the patron in using an information source in

order to find an answer to their reserve question, this too should be counted as a reference transaction.

However, if you do not need to consult an information source because you know exactly what item the patron needs and where to find it on the shelf, this should not be considered a reference transaction.

7. How do I fill out the "Reference Sampling Form"?

Each employee will have one form for each sampling day. It is up to the individual employee to keep track of his/her reference transactions for that day and to note them on the form. To use the form you simply identify the time of day of the particular transaction and the type of transaction (walk-in query, telephone query, or e-mail query) and place a tick mark in the appropriate box. You must keep track of transactions for the duration of time worked on that particular day. At the end of the day, count up the tick marks and note the total for each hour in the column on the far right of the form. Then tally these hourly totals to get the grand total of the day and note this on the bottom of the form. Each library will have designated a collection point for the Reference Sampling Forms. At the end of a sampling day, it is each employee's responsibility to turn-in his/her form at the designated collection point.

8. Do we need to keep track of telephone and e-mail transactions?

Yes. The goal is to collect data on all reference transactions: those conducted in person, over the phone, and via e-mail. The Reference Sampling Form has separate columns for each of these types of transactions so that we can also track the kinds of reference services provided. This means that librarians working at their desks who respond to phone or email questions should also keep track of them on sampling days.

9. Does the duration of the transaction matter? Do I need to note this?

While the duration of the reference transaction is very important information, we are not asking you to keep track of that for the purposes of this project. At this point all you need to do is keep tally of the number of transactions.

10. How do we count referrals?

Count each individual's request for information only one time, even if they are referred from one librarian to another. The first librarian to initiate the reference transaction should tally the transaction. This practice is recommended so that there is no confusion about who is responsible for keeping track of a particular transaction.

11. I lost my Reference Sampling Form and Schedule of Sampling Days. Where can I get other copies?

There should be a supply of both the Reference Sampling Form and the Schedule at each service point.

12. I forgot to keep track of reference transactions during part or all of the scheduled sampling day. What do I do now?

We are trying to obtain as accurate information as is possible for these fourteen days. If you forget to keep count of the number of transactions, important information is lost and our estimates based on this data will be biased. In order to optimize the accuracy of data collected, please make every effort to reconstruct your work for the designated sampling day within 24 hours of the missed day and deposit your Reference Sampling Form at a designated collection point.

13. Why are circulation desks included as sites to collect data?

Reference questions are often asked at points other than the "reference desk." Library users don't always distinguish what kind of questions they have and who the most appropriate person is to answer those questions. For this project we are concerned with tallying the total number of reference transactions, no matter where the question is asked and no matter who provides the answer.

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14. Are only reference librarians required to do this?

No. Each and every library employee who handles reference transactions (as described in #5 above) should be involved in tracking this data.

15. What if I answer a reference question when I'm not "on the desk"?

For this project we our concerned with tallying the total number of reference transactions, no matter where the question is asked and no matter who provides the answer.

16. What do I do with my Reference Transaction Form at the end of my shift?

Each library will designate a collection point for the Reference Sampling Forms. At the end of a sampling day, it is each staff person's responsibility to turn-in his/her form at the designated collection point. The Branch Head will then mail the forms to the Management Information Systems Office (MIS) c/o Siddharth Ram, and he will enter all the information into a database. The total counts will be forwarded to the Public Services Office.

17. Whom should I contact if I have questions?

Please contact the Management Information Systems Office. We'll be happy to answer your questions.

Irma Dillon, Manager, MIS: 405-9113; id8@umail.umd.edu
Siddharth Ram, Graduate Assistant, MIS: 405-9090; sr185@umail.umd.edu

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Summer 2002 Calendar

To download a copy of the Summer 2002 calendar, please click here.

Reference Sampling Form

To download a copy of the form used for tallying reference transactions, please click here.

Sampling Results

Fall 2000 Results

Spring 2001 Results

Fall 2001 Results

Spring 2002 Results

Academic year 2000-2001 sampling results summary

Academic year 2001-2002 sampling results summary

Recording of Questions at Du Bois Reference Desk
December 10, 2001

1. Please write down (or type on the laptop) every question asked of staff at the desk or in the reference area. Follow the staff member(s) after the initial desk contact to hear follow-up questions only if the reference interview is clearly still underway (the librarian is still questioning the patron) and only if you will not miss additional questions at the desk. Return to the desk as soon as possible.

2. Record questions in short phrases rather than complete sentences. You do not need to list the details of a book, journal, or call number, but please record the subjects for which patrons seek materials. We do want to know what services they ask for. Here are some examples:

    a. Find book with a specific call number
    b. Location of journal titled _____
    c. Map of Afghanistan
    d. Print from the Internet
    e. Find articles on agricultural exports in Nigeria
    f. Find peer-reviewed articles on _____
    g. Bathrooms
    h. Where is Infotrac?
    i. Change
    j. Color copy
    k. Public phone
    l. Government documents
    m. Need to print from a diskette
    n. Add money to UCard
    o. Add paper to copier
    p. Index to the Congressional Record
    q. Budget of the University
    r. Find out where articles from a database are in the library
    s. Find materials on child abuse by special needs parents
    t. Type a paper in MS Word

3. Note phone calls with a P next to the question. Ask the staff member to describe the question at the conclusion of the call.

4. After each question, place a check mark under each type of source the staff member uses to answer the question. Record the name of the database(s) used if possible. Directional questions go under Pink Sheet.

5. Use as many sheets as necessary.

Thank you!!!

Reference Desk Questions (December 10, 2001)

HOUR:

Question	Answered with (place check mark for all that apply or list specific tool)					
	Pink Sheet	Catalog	Database	Internet	Ref Tool	Other

Standardized Reference Desk Statistics

FAQ || Reference Flash Stats Form (Excel or PDF)

FAQ

1. Purpose of this Procedure

To establish consistency in statistics-taking at divisional library reference desks, so that data will be comparable from unit to unit.

2. Methodology

We will focus on recording number of queries. (NOTE: At a later time, we will consider ways of quantifying time spent on questions and number of users helped at reference desks.)

Please use the form as follows:

Record reference and directional questions by hour and by day. For reference questions, use one tick mark per topical query.

Examples:

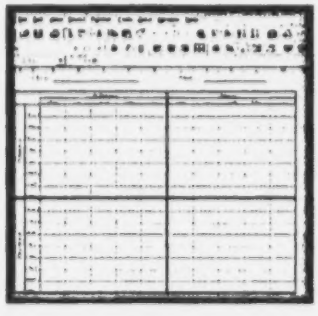
- Catalog and database searching on one topic = 1 question (e.g., How do I find information on Michelangelo's David?)
- A follow-up question on the original topic (during the same conversation) should be considered part of the original question, NOT an additional question (e.g., And how do I get this article since MIT doesn't have it?)
- Tracking down 4 items from 4 citations in a bibliography = 4 questions.
- 3 questions on 3 topics = 3 questions. E.g., I need data on average income in Massachusetts. Also, do you carry XYZ journal? Also, can I get a Harvard Reciprocal Borrowing application?

When in doubt as to how to record questions, use your judgement.

Applications for special borrowing cards (Harvard, BLC, Countway, etc.) should be recorded as reference (not directional) questio ns.

3. Statistics Form

Libraries may use the reference statistics form (Excel or PDF), or any locally-designed form that records reference and directional questions by hour and by day.



Reference Statistics Form

BEST COPY AVAILABLE

Distinguising between...

Reference Questions

1) Any request by a user for information or assistance in locating information which involves an encounter in person, by telephone, by email, or other means between the user and a member of the library staff (full or part-time, including students).
2) The information given may involve the use, recommendation, interpretations, or instruction in the use of one or more reference sources, or knowledge of such sources by a library staff member.
3) Information sources include printed and non-printed materials, machine-readable databases or other electronic media, other library or institutions, and persons inside and outside the library.

Who: Between library staff member and user

Using What: **Information or reference source(s)** **←CRITICAL ELEMENT**

How: Provide assistance with, a recommendation of, an interpretation of, or instruction about

Examples of information or reference sources:

- Library Catalogs: ALICE, OhioLINK Central Catalog
- Electronic Databases: Periodical Abstracts, ERIC, Medline, Lexis-Nexis
- Library Subject Guides
- Internet Search Engines: Google, Yahoo, Librarian's Index to the Internet
- Electronic Reference Books or E-books: Contemporary Authors, Online dictionary
- Books: any book in the library collections, including telephone books
- Another library or agency: Athens Public Library, County Health Dept., Baker Center Information Desk
- People: Other library staff members, other experts

Examples of reference questions:

? How do I find a book called "The Perfect Storm?" (assistance with ALICE)
? I need the page numbers to complete this journal citation. (assistance with database)
? What's the phone number for City Hall? (recommendation of phone book)
? I need help using this bibliography, can you help? (interpretation of a book)
? Show me how to search in Periodicals Abstracts. (instruction about a database)
? Where can I get some recent information about Procter & Gamble? (recommendation of ref sources, online sources—more questions needed)

- ? Where can I get a dictionary to use? (assistance with ALICE or recommendation of a book)
- ? I need a book to help me with footnotes and a bibliography. (recommendation of a book)
- ? How do I find more books about bicycle repair than are in this Library? (assistance with OhioLINK, other bibliographic sources)
- ? I want to make a interlibrary loan request for an article, but I don't know the author's name. (assistance with a database or other bibliographic source)

... and

Non-Reference Questions

1) A non-reference interaction does not involve the knowledge, use, recommendation, interpretation, or instruction in the use of information sources.
2) A non-reference interaction facilitates the use of the library or its environs, and may involve the use of sources describing the library, such as schedules of hours, floor plans, or policy statements.
3) A non-reference interaction may include giving instruction in locating staff or other directional information, or giving assistance of a non-bibliographic nature with equipment or machines, making change, or transferring phone calls.

Who: Between library staff member and user

Using What: Library directories of departments and personnel, library policies, library handbooks; equipment manuals or guides to library equipment; telephone transfer; your memory from training and experience

How: Give directions to locations; inform about rules, procedures, or policies; help/explain equipment; give change; transfer a phone call upon request for another department/person

Examples of non-reference questions (if no additional information comes out during an interview):

- ? Where's the pencil sharpener? (directions to a location)
- ? Where's the Men's Room? (directions to a location)
- ? I have to read a book that is reserved for a class. Where should I go to find it? (directions to a location)
- ? How late are you open? (library policy)

- ? How much are the fines for overdue books? (library policy)
- ? How do I get a PIN number? (library procedure, even though ALICE is used)
- ? How do I request this book from OhioLINK? (library procedure, even though OhioLINK Central Catalog used)
- ? How do I make an interlibrary loan request? (library procedure, even though the form is on the Web site)
- ? Where do I find this call number in the stacks? (directions to a location)
- ? The printer/photocopier needs paper. (help with equipment)
- ? The printer/photocopier won't read my Vendacard. (help with equipment)
- ? How do I print this Web page? (help with equipment)
- ? This computer won't work. Can you get it started for me? (help with equipment)

When Non-reference Questions are Reference Questions in Disguise

Sometimes what seem non-reference questions when uttered are really reference questions, if you ask the appropriate questions to learn what the user actually needs.

Examples:

- ? Where do I find this call number?

It sounds as if directions to a location are needed. BUT, if the user has not noted a library location, to find the correct answer (rather than an educated guess), you have to search ALICE to find/verify a location.

- ? Where are the journals?

It sounds as if directions to a location are needed. BUT, to answer the question adequately/fully, you either must ask for a more specific need or explain the variety of locations for journals and how to best determine a location for the required volume/year. However the interview proceeds, an information resource (usually a database or ALICE) is required for a helpful response.

- ? Where are the history books?

It sounds as if directions to a location are needed. BUT, to provide the best guidance you need to ask more questions about specific needs—the history of who, what, where and when?—so you can provide specific titles and/or call numbers and locations (by using ALICE or a thorough knowledge of LC class numbers).

Statistics Definitions

Directional transaction:

An information contact that facilitates the use of the library in which the contact occurs, or its environs, and that may involve the use of sources describing that library, such as schedules, floor plans, handbooks, and policy statements.

Examples:
-directions for locating facilities such as special rooms, carrels, and telephones
-directions for locating materials for which a user has a call number or which are designated on signs or floor plans
-supplying library handbooks, policy statements, floor plans, and materials such as paper and pencils

Directional assistance provided as part of a reference transaction should not be counted here.

Mechanical transaction:

Assisting users with the operation of machines.

Examples:
-clearing a paper jam in a printer
-replacing an ink jet or ribbon

Questions regarding how to access the Internet, how to dial in to SUMMIT, how to use CD-ROM products, etc. should be counted as reference questions, not mechanical questions.

Reference transaction:

An information contact that involves the use, recommendation, interpretation, or instruction in the use of one or more information sources, or knowledge of such sources, by a member of the reference staff. Information sources include 1) print and non-print materials, 2) the library's own bibliographic records, excluding circulation records, 3) other libraries and institutions, and 4) persons both inside and outside the library.

A question answered through utilization or information gained from previous consultation of such sources is considered a reference transaction, even if the source is not consulted again. A contact that includes both reference and directional service is one reference transaction. Duration should not be an element in determining whether a transaction is reference or directional.

Quick reference transaction:
A reference transaction of 5 minutes or less

Extended reference transaction:
A reference transaction of more than 5 minutes

The University of Texas at Austin
General Libraries
Reference/Information Services Department

REFERENCE DESK MANUAL

March, 2001

TYPES OF QUESTIONS

DIRECTION/INFORMATION QUESTIONS

For General Libraries statistical purposes these may be defined as:

> Questions concerned with the physical location of rooms, offices, etc., and with information about library holdings, policies and procedures. Questions in this category may be answered from personal knowledge, or by using library records (e.g. card catalog, OCLC, serials list, etc.), library publications (brochures, maps, handbooks, etc.), or library information files (as at the reference and information desks in PCL).

Many directional questions are answered at the Information Desk, but a substantial number of the questions received at the Reference Desk or on the telephone are direction or information questions. For some questions -- pencil sharpener, water fountain, time -- a simple answer will be all that's needed on any occasion. Other directional questions -- "Where are the periodicals, documents, dissertations?" -- indicate a need for clarification of exactly what is wanted before answering the questions. When people ask for specific tools or Web sites, it is important to find out if the user has used the tool or the Web before. Many sources require explanation on first use and appropriate follow-up. Some have point-of-use aids, but these aids do not, and are not intended to, replace instruction by the Reference Desk staff.

GENERAL REFERENCE QUESTIONS

For General Libraries statistical purposes these may be defined as:

> Questions which are answered through the use, description, or interpretation of information sources other than those produced by the UT Library. The answering of a general reference question requires a specialized knowledge of information resources. The source of information used is more frequently one which is obvious to the staff member at the time of inquiry is made. The general reference question requires less than fifteen minutes to answer.

General reference questions may offer opportunities for one-on-one bibliographic instruction. If the person is likely to have to follow the same process in the future or asks questions like "How did you know to look in that book?," you will need to balance the desirability of instruction against the number of people queued up at the Reference Desk.

Habit plays a large part in human activities; it's natural to return to the same source the answer was in last time. However, in a heavily used collection like PCL Reference, it is important to know a variety of tools that can be consulted for

simple recurring reference questions. There's more than one place to find the GDP of the United States or the capital of North Dakota or the date of the Battle of Waterloo or the address of the Securities and Exchange Commission.

EXTENDED REFERENCE QUESTIONS

For General Libraries statistical purposes these may be defined as:

> Search
> Questions which require more than fifteen minutes of time to answer.
>
> Problem
> Questions which require more than an hour of time to answer. The answering of such a question employs the specialized knowledge of a trained librarian, as well as an extensive use of library resources which extend beyond the general reference collection. Unanswered questions on which the librarian has worked more than an hour should be recorded here.

The following questions should be considered when the search has taken more than fifteen minutes:

How important does the person asking the question think it is?

If, after fifteen minutes of searching, you tell the person "There are other places I can search, but it will take a while" the person may say "Don't bother, I can use something else instead."

Is the answer to the question likely to be found?

Despite user expectations, not all questions have answers in written forms nor are all written materials available for public use. Privately held businesses do not issue stockholders reports; the CIA does not issue a directory of spies, and many modern poems have had no explications written about them.

Can the user do the searching?

The factors to be considered here include the number and complexity of sources to be consulted, the language of the sources and the languages the user can read, the physical presence of the user - the user in Peeks cannot check successive volumes of the National Union Catalog without making an eight hour drive. Does the user have access to Internet?

What are the time constraints for the user and the reference desk staff member?

Library assistants have, in particular, very tight constraints and do not normally spend off desk time searching for answers to reference questions.

Should I consult with another member of the Reference Desk staff before I spend additional time searching?

Reference staff are encouraged to make an initial effort to find the answer before asking for help. But no one should flounder more than five or ten minutes with no visible signs of progress.

However, while search questions are a useful means of learning both sources and search strategies in a field, there is no value in reinventing the wheel. A lengthy, fruitless search does little for the struggling staff member's confidence and will usually lose the patron.

Consulting with the most knowledgeable member of the Reference Desk staff may be helpful, but just discussing the question with another colleague at the desk or in the department may help you to formulate a successful strategy.

REFERENCE STATISTICS

Direction/Information Questions

Questions concerned with the physical location of rooms, offices, etc. and with information about about library holdings, policies and procedures.
Questions in this category may be answered from personal knowledge, or by using library records (e.d., UTCAT, OCLC, serials list, etc.), library publications (blue sheets, brochures, database guides, maps, handbooks, etc.), or library information files (as at the reference and information desks in PCL).

General Reference Questions

Questions which are answered through the use, description, or interpretation of information sources other than those produced by the UT Library. The answering of a general reference question requires a specialized knowledge of information sources. The source used is more frequently one which is obvious to the staff member at the time the inquiry is made. The general reference question requires less than fifteen minutes.

Extended Reference Questions

The definition of this category is the same as a general reference question. The key here is the length of time required to locate the information (Search Questions) and the extent to which the general collection is used (Problem Questions).

1. Search

   These questions require more than fifteen minutes of time to answer.

2. Problem

   Questions which require more than an hour of time to answer. The answering of such a question employs the specialized knowledge of trained reference staff as well as an extensive use of library resources which extend beyond the general reference collection.

   Unanswered questions on which the librarian has worked more than an hour should be recorded here.

RECORDING REFERENCE TRANSACTIONS

The University Library is conducting its annual project to record the number of reference transactions in all Library locations. The statistics are reported to regional and national agencies and are used internally as a measure of service.

During the two weeks, Monday, October 29,2001 - Sunday, November 11, reference transactions, including telephone queries and responses to written, e-mail, and Real-Time queries, are to be recorded in all library departments and at all library service points, by all library staff (including student assistants) during all hours the library is open. Please record queries with hash marks on the attached form. If you forget to record questions, please don't guess at the number you were asked. Record only the queries that you recall.

Please record reference, equipment support, and directional questions separately, using the information contact definitions on the following page. The definitions for reference and directional questions are those of the American National Standards Institute in ANSI Z39.7-1983. Record queries you receive from library staff members as well as from other users. Duration of assistance should not be an element in determining whether a question is reference, equipment support, or directional. Information sources include print and non-print, electronic, including VIRGO, and communication with any person acting as a resource.

Record information contacts that include **both** reference and directional or reference and equipment support assistance as reference questions. As is mentioned above, include responses to print, e-mail, and Real-Time correspondence. Record these letters and e-mail responses at the time the response is written. Also record as a reference question the assistance you give to individuals doing their own database searching and any staff-mediated online searches you do. The assistance you give users with public computers, printers, reader-printers, etc. is recorded as equipment support.

Do not record LEO or interlibrary loan transactions. Those are reported separately.

Tally each week's transactions in your location, giving separate totals for each of the three categories. Return the forms for both weeks stapled together to Linda Wibert, Reference and Information Services (RIS), Alderman. Please be sure your Library department/service point name is written on the tally sheets.

Thank you for your assistance in this undertaking. Please contact me if you have questions about the reporting form.

Linda Lester
lester@virginia.edu
October 19, 2001

NOTE: PLEASE DUPLICATE THE ENCLOSED FORMS AS NEEDED SO THAT ALL OF YOUR AREAS ARE COVERED.

INFORMATION CONTACT DEFINITIONS

Reference question - an information contact (in person, written, or by telephone) that requires knowledge, use, recommendation, interpretation, or instruction in the use of one or more information sources, including computer software. For example,

1. Showing researchers how to use library materials and information services, e.g., VIRGO, Web, LEXIS/NEXIS. (I've never used *Dissertation Abstracts*. Can you help me with it? How do I do a full text search on *InfoTrac*?) Can you help me learn to use Photoshop?
2. Locating materials in any library. Include the retrieval of microforms and Special Collections materials since these requests usually involve interpretation of finding aids. (Where is *The Encyclopedia of Philosophy*? Where are the film journals? Where do I find this call number?)
3. Providing information or suggesting sources where users can find information. (What is the capital of Delaware? Who publishes the *Washington Post*? Does your library have a copy of John Doe's latest book? Where can I find a short biography of Thomas Jefferson? I need to see a road map of England.)

Directional question - an information contact (in person, telephone, e-mail, letter) that facilitates a user's logistical or physical use of the library and its environs or directs users to locations within the library and elsewhere but does not involve the knowledge, use, recommendations, interpretation, or instruction in the use of any information sources. It may involve the use of descriptive sources such as floor plans, schedules, maps, and policy statements. For example,

1. Locating personnel or other areas of the library. (Where is Mr. Smith's office? How do I get to the computer lab in this building? Where is 3M New? Where is the rest room?)

2. Giving directions to any geographical location. (Where's Newcomb Hall? How do I get to the Gordon Avenue Library? Please direct me to the Fine Arts Library.)

3. Informing a user of library hours. (When do you close tonight?) If you show the user how to find this information on VIRGO, count the transaction as a reference query.

4. Giving assistance of a non-bibliographic, non equipment-related nature. (Where do I get change for the copy machine? Where is a pencil sharpener?)

5. Explaining circulation and other library administrative policies. (For how long can I check out this book? May I pay my fine tomorrow?)

Equipment support question – a query that does not involve the information contacts of a reference or directional transaction but that does involve providing assistance with

computer hardware and printer problems, loading paper in copiers and printers, adjusting the focus on a VCR, assistance with microform equipment, etc. For example,

1. How do I put this reel of microfilm on the reader?
2. I can't seem to increase the volume for this video I need to view.
3. I'm trying to print from this laptop but there's no output from the designated printer.

SPEC Kit 268
Reference Service Statistics & Assessment

Statistical Reports

Arts & Sciences Libraries
Reference Statistics Sampling Week
Fall 2001

List of Tables:

1. Questions per Day of the Week
2. Minutes per Question
3. Libraries : Types of Questions
4. Functional Area : Types of Questions
5. Sites by Functional Area
6. Sites : Types of Questions
7. Types and Subtypes of Questions
8. Patrons : Types of Questions
9. Subjects
10. Subjects (continued)
11. Subjects : Libraries
12. Site by Patron Type
13. Sites by Subtypes of Questions

Selected Questions by Subject Area Codes

Prepared by: Karen F. Smith
Michael Kankiewicz
A. Ben Wagner
Maryellen O'Brien

Day

Last year at the Lockwood Reference Desk the order of the days was: Mon Tues Thu Wed Fri Sun Sat

Statistics

Day

N	Valid	2799
	Missing	0

Questions per Day

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Monday	651	23.3	23.3	23.3
	Tuesday	593	21.2	21.2	44.4
	Wednesday	506	18.1	18.1	62.5
	Thursday	391	14.0	14.0	76.5
	Friday	316	11.3	11.3	87.8
	Saturday	195	7.0	7.0	94.7
	Sunday	147	5.3	5.3	100.0
	Total	2799	100.0	100.0	

Minutes per Question

Minutes		Frequency	Total min.	Percent of total time	Cumulative % of time
	1	1903	1903		
	2	189	378		
1-2 min.		**2092**	**2281**	**23%**	**23%**
	3	110	330		
	4	87	348		
	5	129	645		
	6	45	270		
	7	30	210		
About 5 min.		**401**	**1803**	**18%**	**41%**
	8	27	216		
	9	27	243		
	10	55	550		
	11	17	187		
	12	12	144		
About 10 min.		**138**	**1340**	**14%**	**55%**
	13	11	143		
	14	8	112		
	15	30	450		
	16	6	96		
	17	3	51		
About 15 min.		**58**	**852**	**9%**	**64%**
	18	6	108		
	19	2	38		
	20	28	560		
	21	2	42		
	22	2	44		
About 20 min.		**40**	**792**	**8%**	**72%**
	23	2	46		
	24	4	96		
	25	8	200		
	26	1	26		
	27	1	27		
About 25 min.		**16**	**395**	**4%**	**76%**
	28	2	56		
	29	1	29		
	30	13	390		
	31	1	31		
	32	1	32		
About 30 min.		**18**	**538**	**5%**	**81%**
	34	1	34		
	35	4	140		
	38	1	38		
	40	4	160		
	42	1	42		
	45	8	360		
	50	2	100		
About 35-50 min.		**21**	**874**	**9%**	**90%**
	60	9	540		
	70	2	140		
	75	1	75		
	90	3	270		
60 or more min.		**15**	**1025**	**10%**	**100%**
Grand Totals		**2799**	**9900**	**100%**	

Libraries: Types of Questions

UGL with 30% of the questions fielded 35% of the Directional Questions.

			Type		
			Directional	Reference	Total
Library	APL	Count	76	64	140
		% within Library	54.3%	45.7%	100.0%
		% within Type	4.5%	5.7%	5.0%
	LML	Count	841	643	1484
		% within Library	56.7%	43.3%	100.0%
		% within Type	50.2%	57.2%	53.0%
	SEL	Count	167	145	312
		% within Library	53.5%	46.5%	100.0%
		% within Type	10.0%	12.9%	11.1%
	UGL	Count	590	273	863
		% within Library	68.4%	31.6%	100.0%
		% within Type	35.2%	24.3%	30.8%
Total		Count	1674	1125	2799
		% within Library	59.8%	40.2%	100.0%
		% within Type	100.0%	100.0%	100.0%

Functional Area: Types of Questions

Of the 289 reference questions handled initially by Access Services, 123 were referred (presumably to the reference desks).

			Type		
			Directional	Reference	Total
Functional Area	Reference	Count	683	818	1501
		% within Functional Area	45.5%	54.5%	100.0%
		% within Type	40.8%	72.7%	53.6%
	Access	Count	918	289	1207
		% within Functional Area	76.1%	23.9%	100.0%
		% within Type	54.8%	25.7%	43.1%
	Other	Count	73	18	91
		% within Functional Area	80.2%	19.8%	100.0%
		% within Type	4.4%	1.6%	3.3%
Total		Count	1674	1125	2799
		% within Functional Area	59.8%	40.2%	100.0%
		% within Type	100.0%	100.0%	100.0%

Sites by Functional Area

Individuals in the "Other" category include secretaries in the Reference Offices. Librarian Offices includes Instant Librarian questions answered by students.

Count

		Functional Area			Total
		Reference	Access	Other	
Site	APL Ref Desk	4			4
	Bus/Docs Ref Desk	147			147
	LML Ref Desk	650			650
	Map Room	17			17
	SEL Ref Desk	247			247
	UGL Ref Desk	311			311
	Librarian Offices	125			125
	APL Circ		115		115
	LML Circ		370		370
	UGL/SEL Circ		432		432
	Bison Billing		34		34
	ILL		5		5
	Microforms		238		238
	Individuals		13	82	95
	Preservation			9	9
Total		1501	1207	91	2799

Sites: Types of Questions

			Type		Total
			Directional	Reference	
Site	APL Ref Desk	Count	1	3	4
		% within Site	25.0%	75.0%	100.0%
		% within Type	1%	3%	1%
	Bus/Docs Ref Desk	Count	70	77	147
		% within Site	47.6%	52.4%	100.0%
		% within Type	4.2%	6.8%	5.3%
	LML Ref Desk	Count	289	361	650
		% within Site	44.5%	55.5%	100.0%
		% within Type	17.3%	32.1%	23.2%
	Map Room	Count	4	13	17
		% within Site	23.5%	76.5%	100.0%
		% within Type	.2%	1.2%	.6%
	SEL Ref Desk	Count	155	92	247
		% within Site	62.8%	37.2%	100.0%
		% within Type	9.3%	8.2%	8.8%
	UGL Ref Desk	Count	144	167	311
		% within Site	46.3%	53.7%	100.0%
		% within Type	8.6%	14.8%	11.1%
	Librarian Offices	Count	20	105	125
		% within Site	16.0%	84.0%	100.0%
		% within Type	1.2%	9.3%	4.5%
	APL Circ	Count	75	40	115
		% within Site	65.2%	34.8%	100.0%
		% within Type	4.5%	3.6%	4.1%
	LML Circ	Count	287	83	370
		% within Site	77.6%	22.4%	100.0%
		% within Type	17.1%	7.4%	13.2%
	UGL/SEL Circ	Count	347	85	432
		% within Site	80.3%	19.7%	100.0%
		% within Type	20.7%	7.6%	15.4%
	Bison Billing	Count	34		34
		% within Site	100.0%		100.0%
		% within Type	2.0%		1.2%
	ILL	Count	1	4	5
		% within Site	20.0%	80.0%	100.0%
		% within Type	.1%	.4%	.2%
	Microforms	Count	161	77	238
		% within Site	67.6%	32.4%	100.0%
		% within Type	9.6%	6.8%	8.5%
	Individuals	Count	77	18	95
		% within Site	81.1%	18.9%	100.0%
		% within Type	4.6%	1.6%	3.4%
	Preservation	Count	9		9
		% within Site	100.0%		100.0%
		% within Type	.5%		.3%
Total		Count	1674	1125	2799
		% within Site	59.8%	40.2%	100.0%
		% within Type	100.0%	100.0%	100.0%

Types and Subtypes of Questions

			Type		
			Directional	Reference	Total
Subtype	Library Material	Count	533		533
		% within Type	31.8%		19.0%
	Information	Count	796		796
		% within Type	47.6%		28.4%
	Equipment	Count	345		345
		% within Type	20.6%		12.3%
	Known Item	Count		595	595
		% within Type		52.9%	21.3%
	Topical	Count		530	530
		% within Type		47.1%	18.9%
Total		Count	1674	1125	2799
		% within Type	100.0%	100.0%	100.0%

Patrons: Types of Questions

Case Processing Summary

	Cases					
	Valid		Missing		Total	
	N	Percent	N	Percent	N	Percent
Person * Type	1501	53.6%	1298	46.4%	2799	100.0%

Crosstabulation

			Type		Total
			Directional	Reference	
Person	UB Student	Count	613	670	1283
		% within Person	47.8%	52.2%	100.0%
		% within Type	89.8%	81.9%	85.5%
	UB Faculty or Staff	Count	31	74	105
		% within Person	29.5%	70.5%	100.0%
		% within Type	4.5%	9.0%	7.0%
	General Public	Count	39	74	113
		% within Person	34.5%	65.5%	100.0%
		% within Type	5.7%	9.0%	7.5%
Total		Count	683	818	1501
		% within Person	45.5%	54.5%	100.0%
		% within Type	100.0%	100.0%	100.0%

Subjects

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	General (non-academic)	92	3.3	11.6	11.6
	English	77	2.8	9.7	21.3
	Education (Learning & Instruction)	70	2.5	8.8	30.1
	Architecture & Planning	50	1.8	6.3	36.4
	Business	50	1.8	6.3	42.7
	History	47	1.7	5.9	48.6
	Engineering Sciences	43	1.5	5.4	54.0
	Biological Sciences	37	1.3	4.7	58.7
	Psychology	33	1.2	4.2	62.8
	Geography	19	.7	2.4	65.2
	Social Work	18	.6	2.3	67.5
	Art and Art History	15	.5	1.9	69.4
	Chemistry	15	.5	1.9	71.3
	Economics	15	.5	1.9	73.2
	Law (Jurisprudence)	15	.5	1.9	75.1
	Health Related Professions	14	.5	1.8	76.8
	Library & Information Studies	14	.5	1.8	78.6
	Medicine and Biomedical Science	13	.5	1.6	80.2
	Sociology	13	.5	1.6	81.9
	Political Science	12	.4	1.5	83.4
	Anthropology	11	.4	1.4	84.8
	Religious Studies	11	.4	1.4	86.1
	Computer Science & Engineering	9	.3	1.1	87.3
	Geology	9	.3	1.1	88.4
	Philosophy	9	.3	1.1	89.5
	Modern Languages & Literature	8	.3	1.0	90.6
	Theatre and Dance	8	.3	1.0	91.6
	Communication	7	.3	.9	92.4
	Humanities	7	.3	.9	93.3
	Mathematics	7	.3	.9	94.2
	Linguistics	6	.2	.8	95.0
	African American Studies	4	.1	.5	95.5
	Physics	4	.1	.5	96.0
	Women's Studies	4	.1	.5	96.5
	Management	3	.1	.4	96.9
	Nursing	3	.1	.4	97.2
	Polish Studies	3	.1	.4	97.6
	American Studies	2	.1	.3	97.9
	Athletics	2	.1	.3	98.1
	Communicative Disorders	2	.1	.3	98.4
	Classics	2	.1	.3	98.6
	Media Study	2	.1	.3	98.9
	Judaic Studies	2	.1	.3	99.1
	Latina/Latino Studies	2	.1	.3	99.4

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Pharmacy & Pharmacology	2	.1	.3	99.6
	Asian Studies	1	.0	.1	99.7
	Comparative Literature	1	.0	.1	99.9
	Music	1	.0	.1	100.0
	Total	794	28.4	100.0	
Missing		2005	71.6		
Total		2799	100.0		

Subjects : Libraries

Sample Table showing a few Subjects

			Library				
			APL	LML	SEL	UGL	Total
Subject	African American Studies	Count		2		2	4
		% within Subject		50.0%		50.0%	100.0%
	American Studies	Count				2	2
		% within Subject				100.0%	100.0%
	Anthropology	Count		8		3	11
		% within Subject		72.7%		27.3%	100.0%
	Architecture & Planning	Count	20	20	6	4	50
		% within Subject	40.0%	40.0%	12.0%	8.0%	100.0%
	Art and Art History	Count		13		2	15
		% within Subject		86.7%		13.3%	100.0%
	Asian Studies	Count				1	1
		% within Subject				100.0%	100.0%
	Athletics	Count		1	1		2
		% within Subject		50.0%	50.0%		100.0%
	Biological Sciences	Count		5	21	11	37
		% within Subject		13.5%	56.8%	29.7%	100.0%
	Business	Count	1	44		5	50
		% within Subject	2.0%	88.0%		10.0%	100.0%
	Communicative Disorders	Count		1	1		2
		% within Subject		50.0%	50.0%		100.0%
	Chemistry	Count			15		15
		% within Subject			100.0%		100.0%
	Classics	Count				2	2
		% within Subject				100.0%	100.0%
	Comparative Literature	Count				1	1
		% within Subject				100.0%	100.0%
	Communication	Count		7			7
		% within Subject		100.0%			100.0%
	Computer Science & Engineering	Count		2	4	3	9
		% within Subject		22.2%	44.4%	33.3%	100.0%
	Media Study	Count		2			2
		% within Subject		100.0%			100.0%

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Site by Patron Type

			Person			
			UB Student	UB Faculty or Staff	General Public	Total
Site	APL Ref Desk	Count	1		3	4
		% within Site	25.0%		75.0%	100.0%
		% within Person	.1%		2.7%	.3%
	Bus/Docs Ref Desk	Count	114	6	27	147
		% within Site	77.6%	4.1%	18.4%	100.0%
		% within Person	8.9%	5.7%	23.9%	9.8%
	LML Ref Desk	Count	587	34	29	650
		% within Site	90.3%	5.2%	4.5%	100.0%
		% within Person	45.8%	32.4%	25.7%	43.3%
	Map Room	Count	13	2	2	17
		% within Site	76.5%	11.8%	11.8%	100.0%
		% within Person	1.0%	1.9%	1.8%	1.1%
	SEL Ref Desk	Count	208	23	16	247
		% within Site	84.2%	9.3%	6.5%	100.0%
		% within Person	16.2%	21.9%	14.2%	16.5%
	UGL Ref Desk	Count	286	5	20	311
		% within Site	92.0%	1.6%	6.4%	100.0%
		% within Person	22.3%	4.8%	17.7%	20.7%
	Librarian Offices	Count	74	35	16	125
		% within Site	59.2%	28.0%	12.8%	100.0%
		% within Person	5.8%	33.3%	14.2%	8.3%
Total		Count	1283	105	113	1501
		% within Site	85.5%	7.0%	7.5%	100.0%
		% within Person	100.0%	100.0%	100.0%	100.0%

Sites by Subtypes of Questions

			Directional			Reference		
			Library Material	Information	Equipment	Known Item	Topical	Total
Site	APL Ref Desk	Count			1	1	2	4
		% within Site			25.0%	25.0%	50.0%	100.0%
	Bus/Docs Ref Desk	Count	22	35	13	24	53	147
		% within Site	15.0%	23.8%	8.8%	16.3%	36.1%	100.0%
	LML Ref Desk	Count	113	110	66	128	233	650
		% within Site	17.4%	16.9%	10.2%	19.7%	35.8%	100.0%
	Map Room	Count		3	1	9	4	17
		% within Site		17.6%	5.9%	52.9%	23.5%	100.0%
	SEL Ref Desk	Count	43	54	58	52	40	247
		% within Site	17.4%	21.9%	23.5%	21.1%	16.2%	100.0%
	UGL Ref Desk	Count	32	52	60	61	106	311
		% within Site	10.3%	16.7%	19.3%	19.6%	34.1%	100.0%
	Librarian Offices	Count	9	10	1	26	79	125
		% within Site	7.2%	8.0%	8%	20.8%	63.2%	100.0%
	APL Circ	Count	37	19	19	36	4	115
		% within Site	32.2%	16.5%	16.5%	31.3%	3.5%	100.0%
	LML Circ	Count	101	154	32	78	5	370
		% within Site	27.3%	41.6%	8.6%	21.1%	1.4%	100.0%
	UGL/SEL Circ	Count	97	217	33	83	2	432
		% within Site	22.5%	50.2%	7.6%	19.2%	.5%	100.0%
	Bison Billing	Count	1	30	3			34
		% within Site	2.9%	88.2%	8.8%			100.0%
	ILL	Count		1		4		5
		% within Site		20.0%		80.0%		100.0%
	Microforms	Count	56	60	45	76	1	238
		% within Site	23.5%	25.2%	18.9%	31.9%	.4%	100.0%
	Individuals	Count	16	48	13	17	1	95
		% within Site	16.8%	50.5%	13.7%	17.9%	1.1%	100.0%
	Preservation	Count	6	3				9
		% within Site	66.7%	33.3%				100.0%
Total		Count	533	796	345	595	530	2799
		% within Site	19.0%	28.4%	12.3%	21.3%	18.9%	100.0%

UNIVERSITY AT BUFFALO, SUNY

http://ublib.buffalo.edu/libraries/ext/no5.html

CONNECT @ the Libraries

University Libraries Staff Newsletter

January 29, 2002
2002: no. 5

Science Direct Grows

There are now 925 full-text journal titles included in the **Science Direct** electronic access product, an increase of 175 titles from those available in Fall, 2001. This expansion is the result of negotiations with other SUNY institutions to eliminate duplicate subscriptions throughout SUNY and to select appropriate journals not previously available in SUNY libraries. The newly added journals provide significantly expanded access to scientific/technical literature across the disciplines. A few of these newly available titles and their actual subscription costs are:

- Annals of Nuclear Energy ($2,709)
- Autonomic Neuroscience ($2,369)
- Chemico-Biological Interactions ($2,299)
- Composite Structures ($3,168)
- Computers and Mathematics with Applications ($3,213)
- Journal of Alloys and Compounds ($7,431)
- Journal of Computational and Applied Mathematics ($3,166)
- Journal of Nuclear Materials ($5,504)
- Signal Processing ($2,187)

Reference Statistics Week, Arts and Sciences Libraries

The Results Are In.....

Did you know that nearly 2,800 questions were recorded during Statistics Sampling Week (2,799 to be exact!), or that overall, Monday was the busiest day during sampling week in the Arts & Sciences Libraries, while the fewest qu estions were received on Sunday? These facts and figures came to light during the week of October 22-28, 2001, as ASL staff collected detailed statistics on service desk activities.

From the Map Room to Microforms, the results have now been tabulated by ASL librarians Karen Smith, Margie Wells, Michael Kankiewicz and Ben Wagner. The data provide a detailed analysis of the type of questions that are asked and answered on a daily basis in the ASL.

For example, results indicate that approximately 40% of the questions asked at ASL Libraries during the sampling week were characterized as specific reference questions. Not surprisingly, most questions came from UB students rather than faculty, staff or the general public. 55% of staff time was devoted to transactions lasting 10 minutes or less, while 10% of the time involved questions that took an hour or more to answer. Questions covered a wide range of topics from Affirm ative Action to Zen and martial arts to mushrooms. For those interested in further explorations of the data, statistical tables are currently accessible via the Web (from within UB only) at http://ublib.buffalo.edu/libraries/units/sel/temp/refweek2001.html

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Archive: 2001: no. 4

APPENDIX 4

1. **Number of Users by Status of User**

	Faculty	Staff	Graduate	Undergraduate	Non-Affiliated	Other	TOTAL
Sept/Oct	5	7	4	11	15	0	43
November	4	5	4	17	9	11	50
December	4	1	2	5	16	2	30
January	2	0	7	17	18	7	51
February	1	3	6	13	27	5	55
March	6	6	5	4	28	6	56
April	5	5	22	5	22	3	62
May	4	9	11	6	18	7	55
June	6	3	3	5	14	1	31
July	9	6	13	9	23	2	52
August	6	6	3	7	26	2	50
TOTAL	52	51	100	80	206	46	535
Percentage	10%	9%	19%	15%	38%	9%	

2. Number and Percentage of Non-affiliated questions on UCI and Non-UCI subjects

	UCI Subjects	Non-UCI subjects	Total
Sept/Oct	12	3	15
November	7	2	9
December	11	5	16
January	11	7	18
February	19	8	27
March	15	13	28
April	12	10	22
May	8	10	18
June	9	5	14
July	7	4	11
August	15	13	29
TOTALS	126	80	206
Percentage	61%	39%	

3. Type of Question

	Reference	Access	Holdings	Directional	TOTAL
September-October	31	5	7	0	43
November	42	8	3	0	50
December	16	7	6	0	30
January	30	18	2	2	51
February	44	6	2	0	55
March	46	10	0	0	56
April	46	12	1	3	62
May	49	4	0	2	55
June	23	5	3	0	31
July	35	14	3	0	52
August	47	2	0	1	50
TOTAL	327	75	24	7	433
Percentage	76%	17%	5%	2%	

4. Type of Question by Status of User

	Faculty	Staff	Graduate	Undergraduate	Non-Affiliated	Other	TOTAL
Reference	41	40	59	65	177	26	408
Access	12	7	22	28	18	4	91
Holdings	3	2	4	2	15	1	27
Directional	0	0	3	1	5	0	9
TOTAL	56	49	88	96	215	31	535

5. Day of Week Question Asked

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
September-October	8	4	9	10	6	4	2
November	11	13	15	8	9	4	2
December	4	8	9	2	2	1	4
January	20	6	14	6	2	0	6
February	7	10	8	14	13	4	3
March	13	15	9	6	2	8	4
April	11	9	9	10	15	5	5
May	8	14	17	7	6	3	3
June	5	10	8	2	2	3	2
July	5	14	7	14	12	1	2
August	11	11	12	10	6	4	6
TOTAL	103	114	117	89	75	37	39
Ranking	3	2	1	4	5	7	6

6. Time of Day Message Sent

	12-4 a.m.	4-6 a.m.	6-8 a.m.	8-10 a.m.	10-12 p.m.	12-2 p.m.	2-4 p.m.	4-6 p.m.	6-8 p.m.	8-10 p.m.	10-12 p.m.
Sept/Oct	4	0	5	4	5	4	11	7	4	2	0
Nov	0	3	0	5	4	5	9	3	0	4	0
Dec	0	0	5	6	7	5	5	6	3	1	2
Jan	5	1	3	4	6	10	8	6	4	4	1
Feb	0	0	1	1	10	4	8	5	4	4	4
Mar	0	0	5	3	8	8	5	3	6	3	0
Apr	2	0	0	7	7	7	4	4	1	3	3
May	2	0	0	7	10	12	10	12	0	3	1
June	2	3	1	5	6	7	1	3	3	1	0
July	1	0	1	10	10	10	7	5	3	0	5
August	0	0	2	8	9	5	7	5	2	7	5
TOTALS	16	7	23	60	82	77	75	59	27	32	21
Rankings	10	11	8	4	1	2	3	5	7	6	9

7. Time Between Receipt of Question and Answer

	Number of Questions	Total time	Average	Shortest	Longest
November	37	234:08:00	6.32	22min	22:14
December	22	159:48:00	7:24	15 min	21:29
January	40	347:29:00	9:08	26 min	22:14
February	38	328:14:00	9:03	4 min	23:20
March	35	323:30:00	9:23	26 min	22:32
April	32	237:02:00	7:39	11min	22:14
May	46	322:29:00	7:02	24 min	22:04
June	25	127:07:00	5:32	17 min	20:39
July	47	270:21:00	5:11	4 min	21:33
August	52	287:19:00	5:51	9 min	14:20
TOTALS	374	2633:07:00	7:04		

Appendix A: Reference Statistics

	FY2001	FY2000	*Change*
Desk Questions			
Main	74,948	65,993	
Science	22,355	23,326	
Total	**97,303**	**89,319**	**8.94%**
Phone Questions			
Main	9,352	10,426	
Science	1,622	2,452	
Total	**10,974**	**12,878**	**-14.78%**
E-mail Questions			
Main	1,936	1,718	
Science	99	86	
Total	**2,035**	**1,804**	**12.80%**
Reference Total	***110,312***	***104,001***	***6.07%***

Comparison of UGA Libraries Traffic: Electronic v. Traditional
December, 2001 - May, 2002 (6 months)

	Total page views (Sawmill)	UGA use of GALILEO resources	FY2000* Library traffic x 0.5
Electronic Traffic			
Library homepage {default page}	810,639		
/ejournals/ (/redir/ & /{default page} & /?{search})	725,613		
Library-published: /darchive/ & /hargrett/ & /russell/ & /maproom/	640,758		
/reserves/	239,751		
/researchcentral/ & /pathfind/	57,631		
Total link-outs by UGA from all GALILEO resources (Dec 3, 01 -)		85,782	
percent of total GALILEO use statewide (1,689,064) = 5%		0.051	
Total link-outs by UGA to UGA-owned GAILILEO resources (Dec 3, 01 -)		29,302	
percent of total GALILEO use statewide (1,689,064) = 2%		0.017	
Traditional Traffic			
Main & Science gate count			639,125
Main & Science items checked out			260,134

*FY2001 due out soon.

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Reference Transaction Sampling Project
Spring 2002 Sampling Results

Click here to view the Summary Report.

Click on titles below to view charts of results:

Total Number of Transactions by Sampling Day
Total Number of Transactions by Library by Sampling Day
Average Number of Walk In Transactions by Library by Time of Day
Percentages of Transaction Types for Each Library
Service Units: Pie Chart of Percentage Share of Transactions

Return to Reference Transaction Sampling Project Page
Return to LARC Page
Previous | Staff Home | UM Libraries Home | PAS Home | MIS Home Search UM Libraries

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The Reference transaction sampling data for the Spring 2002 semester has been analyzed and a summary of the results follows. We have also included a comparison of data between this year and that from academic year 2000-2001, as well as data from Spring 2001. It is interesting to note that on an annual basis, Chemistry and Nonprint Media saw an increase in volume from last year while every other Library saw a decrease in activity. Overall there was a decrease in reference activity from last year based on walk-in, telephone and e-mail questions. The charts illustrating the data for the Spring 2002 semester will be placed on the LARC web page. We will notify staff when they are available for viewing.

REFERENCE TRANSACTION SAMPLING: SUMMARY OF DATA, SPRING 2002

Comparison of statistics Spring 2002 vs. Spring 2001

Library	Total volume recorded on sampling days Spring 2002	Total volume recorded on sampling days Spring 2001	Average transactions per day Spring 2002	Average transactions per day Spring 2001	Transaction volume for the year 2001-02*	Transaction volume for the year 2000-01*
Architecture	107	157	8	11	1,813	2,590
Art	239	316	17	23	3,731	4,403
Chemistry	150	100	11	7	2,296	1,477
EPSL	1,429	1,680	102	120	18,935	23,450
McKeldin	6,255	5,965	447	426	88,942	92,379
Non Print	1,285	608	91	43	14,602	9,240
Performing Arts	521	1,055	37	75	6,916	13,657
Total	10,360	9,881	740	706	141,120	147,196

* These values have been obtained by extrapolation of the data from the reported sampling totals.

Review by semester:

The Libraries recorded a high of 1111 transactions on Feb 19, 2002 (Tuesday) and a low of 371 on March 27, 2002 (Wednesday). Compared to Spring 2001, all Libraries experienced a decrease in volume except Chemistry, McKeldin and Nonprint Media. Compared to Fall 2001, only EPSL saw a substantial increase, while Nonprint Media and PAL saw small increases and the others decreased.

Review by week:

There was a clear cyclical trend in the volume of transactions within each week of the semester. The lowest activity was reported on Saturdays, the volume rose steadily through the week to reach peak levels on Tuesday, and subsequently declined as the week progressed. The average volume reported on Saturdays was 398, and on Tuesdays was 1108. The average volume on weekdays and weekends was 816 and 431 respectively.

Review by time of the day:

In McKeldin Library, midday (from noon to 4 PM) continued to be the busiest time for walk-in reference transactions. 42 percent of McKeldin's daily transactions occur during this time period. All other Libraries mirrored this trend, though on lower volumes.

Review by library:

McKeldin continued to account for 60 percent of total transaction activity in the Libraries system. EPSL (14%) and Nonprint Media (12%) are the next two busiest locations.

Review by transaction type:

The Libraries reported that 79 % of all transactions took place in person. 17 % used telephones for this purpose and 4 % used e-mail (a 100% increase over Fall 2001!). Hornbake Library showed the highest component of telephone (30 %) and e-mail (28 %) based transactions.

Reference Transaction Sampling Resumes!!!

To determine the level of reference activity that occurs during Summer, MIS and LARC have jointly decided to sample reference activity in Summer 2002. Results of this exercise will determine whether we continue sampling during Summer in the years to come. Information on this has already been sent out to the Service Units.

Irma Dillon
Siddharth Ram
Management Information Systems

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SAMPLING DATA 2001-2002

LIBRARY	SERVICE UNIT	WALK-IN	TELEPHONE	E-MAIL	TOTAL
McKeldin	*Service Plus*	6238	1285	51	7574
	Periodicals	2101	50	0	2151
	Government Documents	459	113	63	635
	Reserves	826	96	13	935
	East Asia	61	2	0	63
	Social Sciences	4	7	11	22
	Circulation	641	252	5	898
	Prange	4	28	58	90
	Rovers	193	1	4	198
	Arts & Humanities	5	23	32	60
	ETIC	49	2	0	51
	Map Room	25	4	0	29
Hornbake	*National Broadcasting Archives*	66	36	68	170
	Archives & Manuscripts	26	75	84	185
	Maryland Room	188	9	3	200
Nonprint media	*Reference*	1514	532	40	2086
EPSL	*Reference*	1664	302	78	2044
	Circulation	573	87	1	661
Arts	*Reference*	247	26	15	288
	Circulation	189	56	0	245
Architecture	*Reference*	226	29	4	259
Chemistry	*Reference*	287	41	0	328
Performing Arts	*Reference*	749	124	2	875
	IPAM	7	22	42	71
	SCPA	4	1	37	42
Total Libraries	*All Service Units*	16346	3203	611	20160

▲ return to top

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LIBRARY ADMINISTRATION

UNM General Library PUBLIC STATISTICS

Library Public Statistics are compiled monthly from Centennial Science and Engineering Library, Fine Arts Library, Parish Memorial Library, and Zimmerman Library. Data included in the library's ARL Statistics is shaded in orange.

Public Statistics--July 1, 2000-June 30, 2001

Type	July	Aug.	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	March	April	May	June	TOTAL
Reference/Information													
Total Ref/Info Contacts	5,944	8,198	10,321	11,050	10,221	4,229	7,369	7,159	10,305	10,801	5,616	5,283	96,496
Reference in person	2,651	4,108	5,586	6,245	6,307	2,273	3,850	3,643	5,566	5,894	2,781	2,746	51,650
Reference by phone	708	742	791	857	571	385	647	830	1,028	748	910	460	8,677
Reference by e-mail	119	139	65	86	87	43	60	88	71	59	67	77	961
Total Reference Questions	3,478	4,989	6,442	7,188	6,965	2,701	4,557	4,561	6,665	6,701	3,711	3,216	61,174
Directional in person	2,179	2,982	3,589	3,520	3,027	1,331	2,548	2,243	3,291	3,771	1,600	1,841	31,922
Directional by phone	218	213	290	308	205	187	254	327	320	362	279	246	3,209
Directional by e-mail	19	14	0	34	24	10	10	28	29	22	360	24	574
Total Directional Questions	2,416	3,209	3,979	3,862	3,256	1,528	2,812	2,598	3,640	4,155	1,915	2,111	35,481
Instructional Sessions - Group													
Non-UNM Groups # Sessions	3	3	6	11	2	4	10	9	6	4	2	3	63
Course-Related # Sessions	3	27	74	49	14	0	34	54	83	15	1	2	356
Research Instruction # Sessions	0	0	0	9	0	0	0	12	9	0	0	0	30
Credit Courses # Sessions	0	32	72	72	72	22	8	4	4	4	4	0	294
Subject-Specialist # Sessions	0	10	7	4	1	0	7	7	6	3	1	6	52
Research Tools # Sessions	0	0	8	0	1	0	0	0	0	0	0	0	9
Other # Sessions	4	7	14	12	10	22	4	25	21	12	20	23	174
ARL Group Subtotal # Sessions	10	79	181	157	100	48	63	111	129	38	28	34	978
Non-UNM Groups # Participants	63	22	48	204	52	76	255	165	101	75	28	75	1,164
Course-Related # Participants	69	452	1,545	816	296	0	448	909	1,549	295	9	39	6,427
Research Instruction # Participants	0	0	0	1	0	0	0	79	13	0	0	0	93
Credit Courses # Participants	0	137	137	137	137	137	158	8	8	8	8	0	875

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Subject-Specialist # Participants	0	142	67	30	16	0	94	90	95	59	9	74	676
Research Tools # Participants	0	0	10	0	1	0	0	0	0	0	0	0	11
Other # Participants	80	122	132	69	88	274	35	201	237	67	332	474	2,111
ARL Group Subtotal # Participants	**212**	**875**	**1,939**	**1,257**	**590**	**487**	**990**	**1,452**	**2,003**	**504**	**386**	**662**	**11,357**
Non-UNM Groups # Contact Hours	0	0	0	0	0	0	383	135	103	147	8	47	822
Course-Related # Contact Hours	0	0	0	8	3	0	113	969	1,333	296	0	54	2,776
Research Instruction # Contact Hours	0	0	0	0	0	0	0	119	20	0	0	0	138
Credit Courses # Contact Hours	0	0	0	0	0	0	0	24	24	62	33	0	143
Subject-Specialist # Contact Hours	0	8	7	2	1	0	7	12	6	3	9	5	59
Research Tools # Contact Hours	0	0	0	0	0	0	0	0	0	0	0	0	0
Other # Contact Hours	0	0	0	0	0	0	57	201	55	67	266	565	1,211
Group Subtotal and Contact Hours	**0**	**8**	**7**	**10**	**4**	**0**	**560**	**1,459**	**1,540**	**575**	**316**	**671**	**5,148**
Instructional Sessions - Individual													
Tutorial Sessions # Sessions	634	371	2,357	2,474	2,374	785	759	2,474	1,927	2,147	472	624	17,398
Subject-Specialist # Sessions	1	4	9	7	4	2	2	5	7	3	1	5	50
Individual # Sessions	4	10	11	15	13	28	64	77	54	78	48	22	424
Individual Totals # Sessions	**639**	**385**	**2,377**	**2,496**	**2,391**	**815**	**825**	**2,556**	**1,988**	**2,228**	**521**	**651**	**17,872**
Tutorial Sessions # Participants	634	371	2,358	2,474	2,377	782	759	2,477	1,927	2,147	472	194	16,972
Subject-Specialist # Participants	1	4	9	7	13	1	2	4	7	2	1	5	56
Individual # Participants	4	10	11	15	1	22	53	59	41	40	38	19	313
Individual Totals # Participants	**639**	**385**	**2,378**	**2,496**	**2,391**	**805**	**814**	**2,540**	**1,975**	**2,189**	**511**	**218**	**17,341**
Tutorial Sessions # Contact Hours	0	0	4	0	3	3	847	3,005	2,206	2,456	518	815	9,856
Subject-Specialist # Contact Hours	1	2	3	3	4	2	2	4	5	3	2	4	35
Individual # Contact Hours	4	3	– 4	5	0	1	55	88	49	65	52	30	354
Individual Totals # Contact Hours	**5**	**5**	**11**	**8**	**7**	**6**	**904**	**3,097**	**2,260**	**2,523**	**571**	**849**	**10,245**
Online Searches	726	0	0	0	0	0	0	0	0	0	0	0	726
Circ. Transactions, general collection	8,400	8,574	13,117	22,946	18,484	12,296	21,785	21,579	24,950	30,319	11,664	16,233	210,347
Circ. Transactions, reserve materials	859	3,168	8,776	7,697	5,701	2,282	9,313	14,792	13,071	12,579	5,982	3,258	87,478
Circ. Transactions, manual circulations	13	399	671	685	104	43	885	935	1,049	1,400	597	483	7,264
In-house use	6,896	6,349	8,976	10,353	9,461	5,775	5,427	65,043	1,561	8,445	5,051	8,688	142,025
Gate count	67,750	91,353	152,387	164,112	144,353	86,884	96,110	143,319	135,184	155,409	90,673	76,674	1,404,208
Interlibrary Loan													
ILL originals borrowed	593	603	659	880	738	388	581	648	720	761	464	615	7,650

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http://www.unm.edu/~libadmin/PUBLICSTATS.htm

ILL photocopies borrowed	535	466	747	934	1,109	434	662	833	958	916	508	606	8,708
ILL unfilled borrowed	95	107	189	399	277	195	239	317	364	336	213	175	2,906
Total ILL Borrowed	**1,223**	**1,176**	**1,595**	**2,213**	**2,124**	**1,017**	**1,482**	**1,798**	**2,042**	**2,013**	**1,185**	**1,396**	**19,264**
ILL originals loaned	621	768	909	773	882	468	930	981	1,064	800	601	694	9,491
ILL photocopies loaned	472	510	237	768	560	346	651	632	885	636	505	462	6,664
ILL unfilled loaned	1,377	1,571	2,220	2,172	2,075	1,352	2,060	2,440	2,603	2,100	1,502	1,593	23,065
Total ILL Loaned	**2,470**	**2,849**	**3,366**	**3,713**	**3,517**	**2,166**	**3,641**	**4,053**	**4,552**	**3,536**	**2,608**	**2,749**	**39,220**
Document Delivery													
DD UNM mtis filled requests	70	72	62	125	49	18	47	55	60	46	54	49	707
DD OCLC filled requests	44	99	136	46	16	45	48	75	86	126	93	89	903
DD other filled requests	0	0	2	0	0	0	3	6	19	8	9	5	52
Total DD Filled Requests	**114**	**171**	**200**	**171**	**65**	**63**	**98**	**136**	**165**	**180**	**156**	**143**	**1,662**

Last Updated on 8/27/01
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Statistical Highlights (All Campuses)

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Holdings | Expenditures

Staffing (FTE) | Services

ARL Index Rankings

▸ Holdings

Holdings	2000-2001	Change from 99-00
Bound volumes	2,345,638	▲ 54,633
Volumes added during 2000-2001 (net)	54,633	▼ 5,926
Current serials received (titles)	35,502	▲ 594
Electronic journals (titles)	13,700	N.A.
Microforms (units)	3,096,687	▲ 52,436
Maps (units)	174,840	▲ 1,845

▸ Expenditures

Expenditures	2000-2001	Change from 99-00
Monographs	$1,288,115	▲ $47,542
Current serials	$2,667,901	▲ $380,460
Electronic resources	$894,899	▲ $385,429
Total library materials & resources (local funds)	$4,763,072	▲ $356,953
OhioLINK funds (additional electronic resources)	$529,965	▲ $89,587

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► Staffing (FTE)

Staffing (FTE)	2000-2001	Change from 99-00
Professional staff	63.00	▲ 4.00
Support staff	72.65	▼ 7.35
Student assistants	58.18	▼ 7.03
Total staffing	193.83	▼ 10.38

► Services

Services	2000-2001	Change from 99-00
Walk-in visitors (all buildings)	1,319,746	▲ 16,758
Library Web user sessions	926,724	▲ 242,430 (est.)
User sessions from outside library	731,619	▲ 204,372 (est.)
Reference transactions	109,955	▼ 5,665
Library instruction (presentations)	879	▲ 50
Library instruction (participants)	17,006	▼ 445
Circulation check-outs	383,531	▼ 17,563
Video circulations	28,977	▲ 4,504
In-house use	304,413	▼ 46,715
Article downloads from Electronic Journal Center	76,306	▲ 39,636
Interlibrary & OhioLINK loans (lending)	69,278	▲ 17,813
Interlibrary & OhioLINK loans (borrowing)	39,726	▼ 11,673

► ARL Index Rankings

ARL Index Rankings (113 academic library members)	2000-2001	Change from 99-00
Ohio State University	19	▼ 1
University of Cincinnati	49	▲ 3
Ohio University	**73**	▼ 3
Kent State University	103	▼ 6
Case Western University	109	▼ 1

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Call Summary Report

Purdue 11/25/2001 - 5/01/2002

	Call Information				Queue Information		
Logged Time	Total Calls	Successful Calls	Failed Calls	Abandoned Calls	Average Queue Wait	Longest Queue Wait	Average Handle Time
November 26, 2001	2	2	0	0	00 00 28	00 00 55	00 07 29
November 27, 2001	4	4	0	0	00 00 08	00 00 32	00 04 05
November 28, 2001	4	4	0	0	00 00 37	00 02 28	00 02 22
November 30, 2001	11	11	0	0	00 02 18	00 25 21	00 04 51
December 04, 2001	2	2	0	0	00 01 41	00 03 22	00 03 04
December 05, 2001	1	0	1	0	00 00 00	00 00 00	00 00 00
December 07, 2001	5	4	0	1	00 00 15	00 01 01	00 07 50
December 10, 2001	4	3	0	1	00 00 16	00 00 47	00 00 05
December 12, 2001	6	5	0	1	00 03 19	00 16 36	00 07 23
December 21, 2001	2	2	0	0	00 00 06	00 00 11	00 19 22
January 04, 2002	9	7	0	2	00 00 06	00 00 44	00 09 55
January 16, 2002	1	1	0	0	00 00 10	00 00 10	00 00 09
January 18, 2002	3	2	0	1	00 00 08	00 00 15	00 08 18
January 24, 2002	1	1	0	0	00 00 08	00 00 08	00 16 47
February 01, 2002	2	2	0	0	00 00 06	00 00 12	00 00 42
February 08, 2002	1	1	0	0	00 00 20	00 00 20	00 00 07
February 20, 2002	32	27	0	5	00 00 09	00 03 59	00 09 02
February 21, 2002	14	13	0	1	00 00 05	00 01 07	00 14 40
February 22, 2002	1	1	0	0	00 00 10	00 00 10	00 00 15
February 25, 2002	3	0	0	3	00 00 00	00 00 00	00 00 00
March 08, 2002	2	2	0	0	00 00 05	00 00 10	00 06 42
March 11, 2002	4	4	0	0	00 00 06	00 00 23	00 04 33

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Call Detail Report

Purdue 11/25/2001 - 5/01/2002

Logged Time	Group Name	Agent	IP Address	Caller Name	Caller Email	Connect Speed	Program ID
11/26/2001							
15:41:01	purdue	Chris K	132.170.186.114	brian mathews	test@test.com	r=132.170.186.114	VgToolBarCtrl - 1.2.0.9
15:41:58	purdue	Chris K	132.170.186.114	brian mathews	test@test.com	r=132.170.186.114	VgToolBarCtrl - 1.2.0.9
11/27/2001							
12:55:01	purdue	Brook F	128.210.125.53	monica holbrook	mholbrook@purdue.edu	r=128.210.125.53	VgNetscapeToolBarCtrl - 1.2.0.25
12:58:15	purdue	Brook F	128.210.124.183	Amy Van Epps	vanepa@purdue.edu	r=128.210.124.183	VgNetscapeToolBarCtrl - 1.2.0.27
15:49:04	purdue	Amy VE	208.255.236.33	sammy sosa	ss@cc.com	r=208.255.236.33	VgToolBarCtrl - 1.2.0.27
16:08:03	purdue	Amy VE	208.255.236.33	sammy sosa	ss@cc.com	r=208.255.236.33	VgToolBarCtrl - 1.2.0.27
11/28/2001							
12:56:03	purdue	JHerubel	128.210.125.53	monica holbrook	mholbrook@purdue.edu	r=128.210.125.53	VgNetscapeToolBarCtrl - 1.2.0.25
14:47:37	purdue	Pat W	128.210.90.13	i tap	pfrazee@purdue.edu	r=128.210.90.13	VgNetscapeToolBarCtrl - 1.2.0.27
14:49:38	purdue	Pat W	128.210.90.13	i tap	pfrazee@purdue.edu	r=128.210.90.13	VgNetscapeToolBarCtrl - 1.2.0.27
14:49:54	purdue	Pat W	128.210.90.13	i tap	pfrazee@purdue.edu	r=128.210.90.13	VgNetscapeToolBarCtrl - 1.2.0.27
11/30/2001							
13:20:35	purdue	Chris K	128.210.124.130	Hal Kirkwood	kirkwood@purdue.edu	r=128.210.124.130	VgToolBarCtrl - 1.2.0.27
14:11:24	purdue	Carolyn L	128.210.125.133	Kristine Anderson	kanderso@purdue.edu	r=128.210.125.133	VgNetscapeToolBarCtrl - 1.2.0.27
14:15:23	purdue	JHerubel	128.210.125.150	jean-pierre herubel	jpvmh@purdue.edu	r=128.210.125.150	VgNetscapeToolBarCtrl - 1.2.0.27
14:15:25	purdue	KristineA	128.210.125.150	jean-pierre herubel	jpvmh@purdue.edu	r=128.210.125.150	VgNetscapeToolBarCtrl - 1.2.0.27
14:15:26	purdue	Carolyn L	128.210.125.150	jean-pierre herubel	jpvmh@purdue.edu	r=128.210.125.150	VgNetscapeToolBarCtrl - 1.2.0.27
14:15:27	purdue	Carolyn L	128.210.125.150	jean-pierre herubel	jpvmh@purdue.edu	r=128.210.125.150	VgNetscapeToolBarCtrl - 1.2.0.27
14:15:30	purdue	Carolyn L	128.210.125.150	jean-pierre herubel	jpvmh@purdue.edu	r=128.210.125.150	VgNetscapeToolBarCtrl - 1.2.0.27
14:15:31	purdue	Carolyn L	128.210.125.150	jean-pierre herubel	jpvmh@purdue.edu	r=128.210.125.150	VgNetscapeToolBarCtrl - 1.2.0.27
14:15:32	purdue	Carolyn L	128.210.125.150	jean-pierre herubel	jpvmh@purdue.edu	r=128.210.125.150	VgNetscapeToolBarCtrl - 1.2.0.27
14:22:05	purdue	Carolyn L	128.210.125.133	Kristine Anderson	kanderso@purdue.edu	r=128.210.125.133	VgNetscapeToolBarCtrl - 1.2.0.27
14:28:53	purdue	KristineA	128.210.125.150	jean-pierre herubel	jpvmh@purdue.edu	r=128.210.125.150	VgNetscapeToolBarCtrl - 1.2.0.27
12/4/2001							
13:11:28	purdue	Brook F	128.210.124.125	Jen Venable	jvenabl@purdue.edu	r=128.210.124.125	VgToolBarCtrl - 1.2.0.25
13:11:29	purdue	V Killion	128.210.124.125	Jen Venable	jvenabl@purdue.edu	r=128.210.124.125	VgToolBarCtrl - 1.2.0.25
12/5/2001							
13:05:08	purdue	JHerubel	128.210.124.125	Jen Venable	jvenabl@purdue.edu	r=128.210.124.125	VgToolBarCtrl - 1.2.0.25
12/7/2001							
9:56:35	purdue	M Fosmire	128.210.124.104	me me	fosmire@purdue.edu	r=128.210.124.104	VgNetscapeToolBarCtrl - 1.2.0.27
10:05:25	purdue	M Fosmire	128.210.124.104	me me	fosmire@purdue.edu	r=128.210.124.104	VgNetscapeToolBarCtrl - 1.2.0.27

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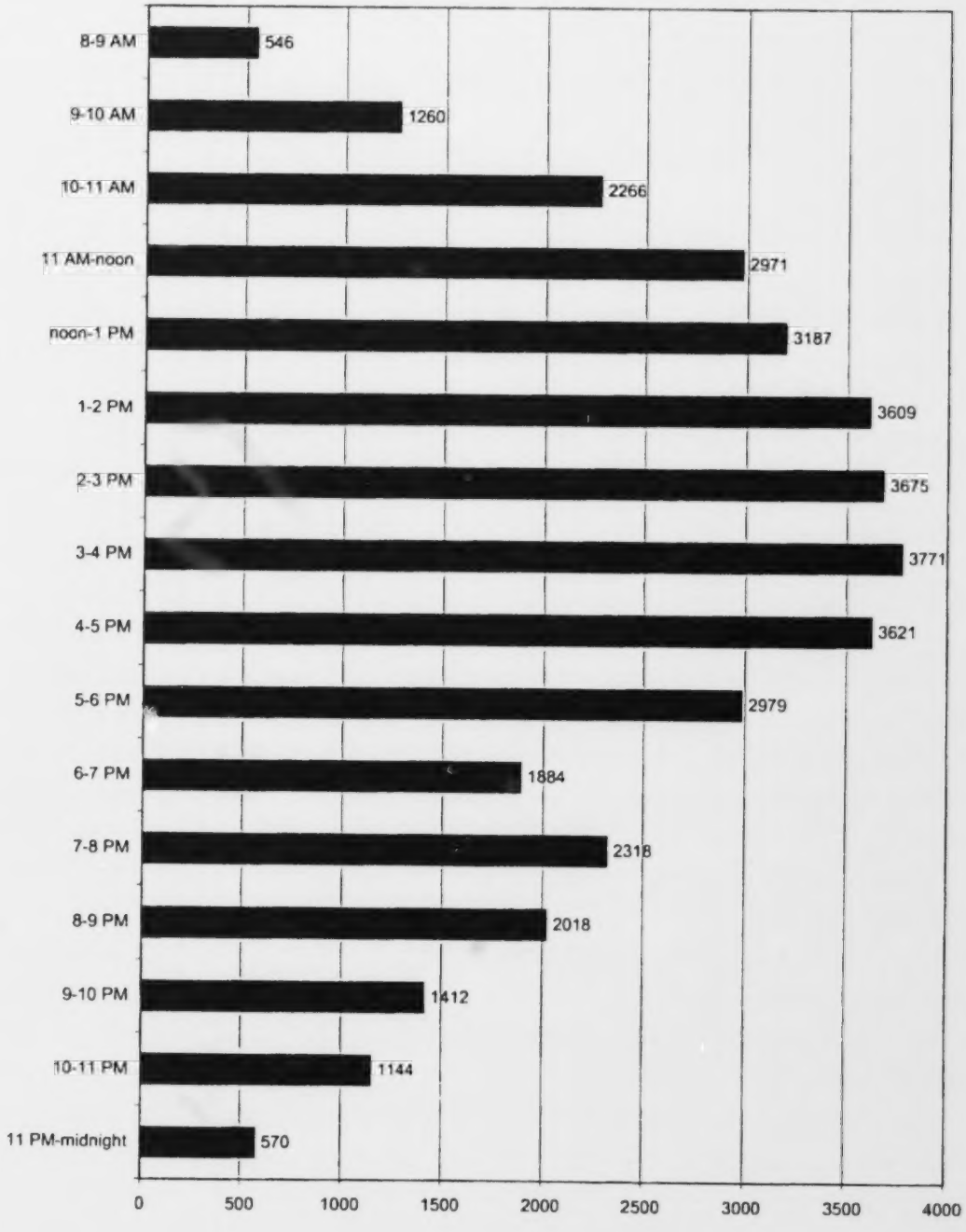
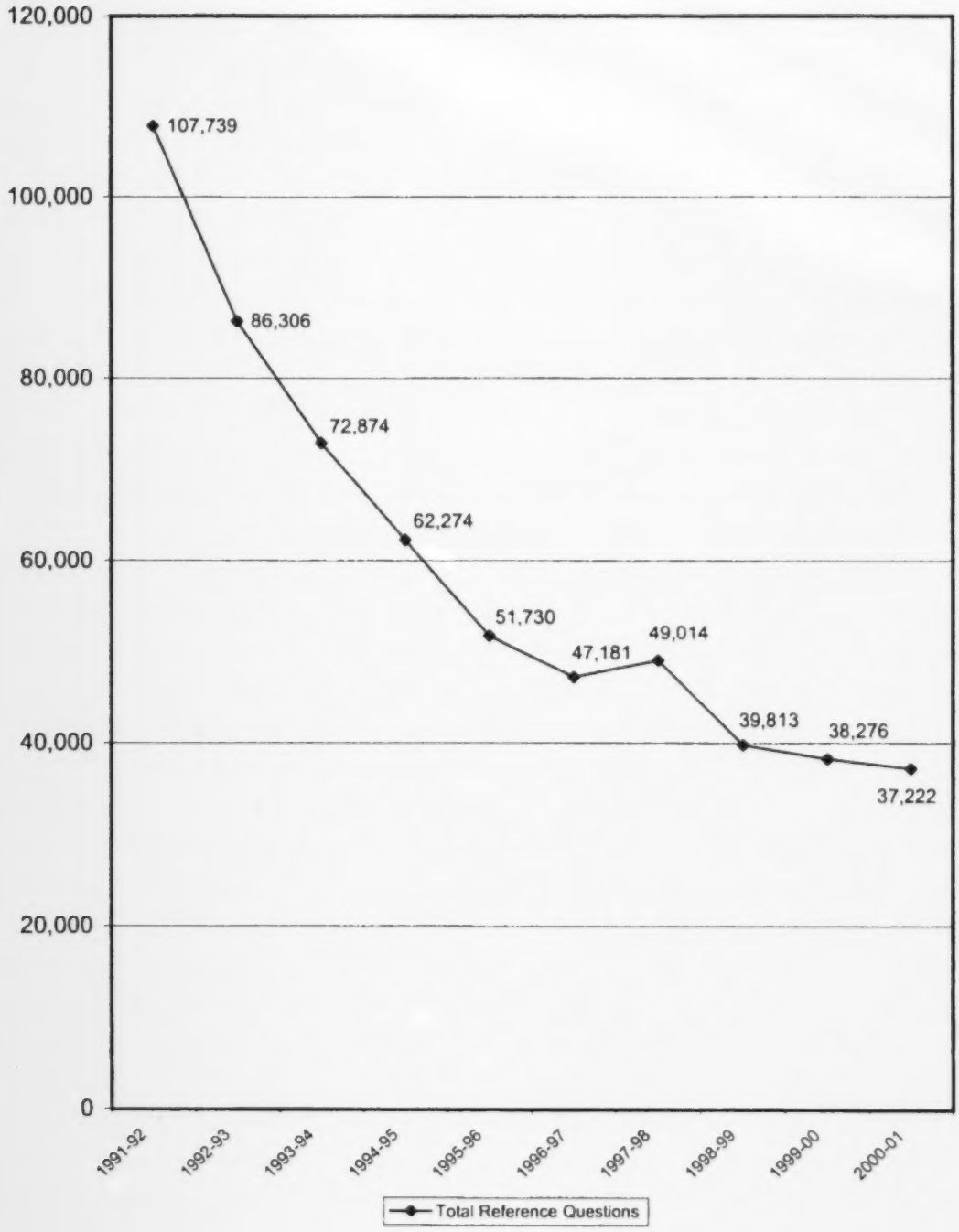
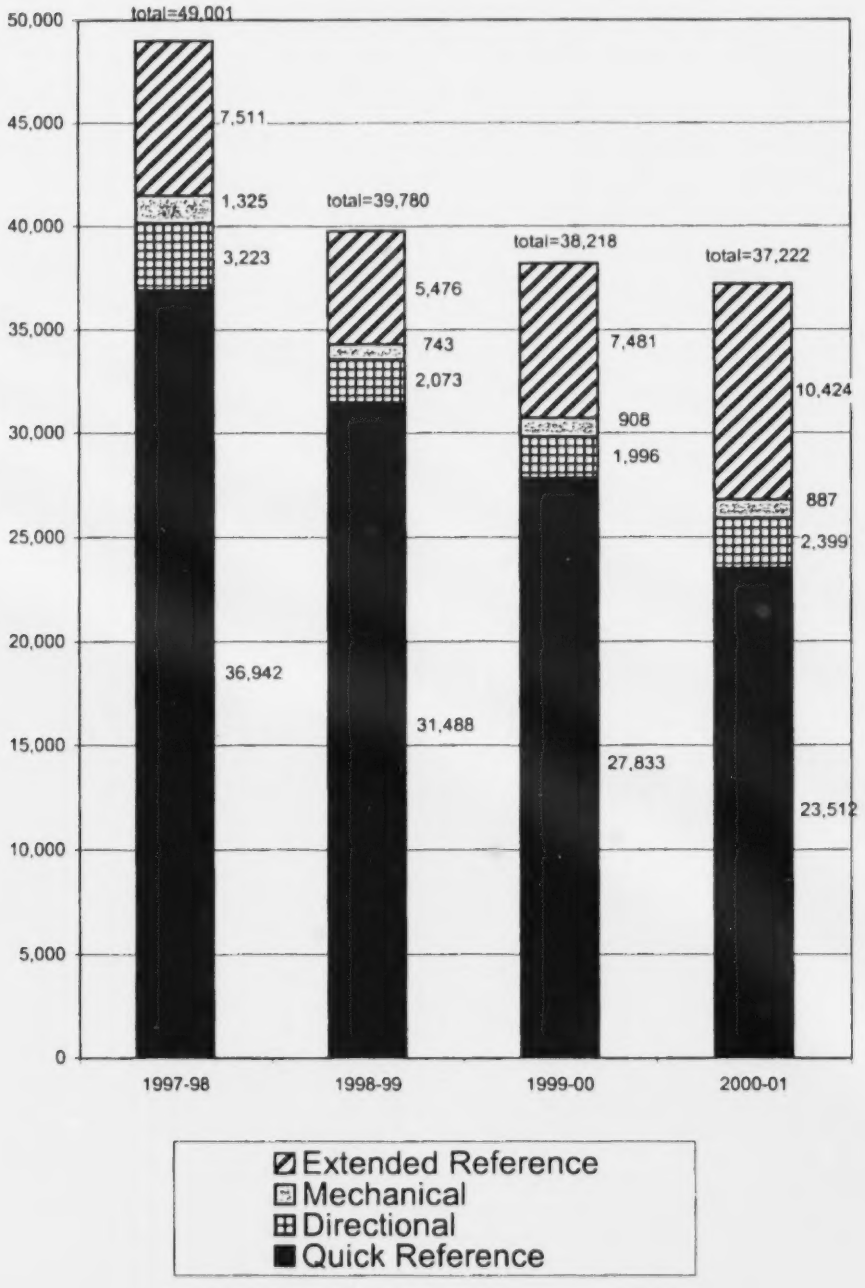
Reference Department Annual Report, 2000-2001, Chart 1
Reference Questions Per Hour, 2000-2001



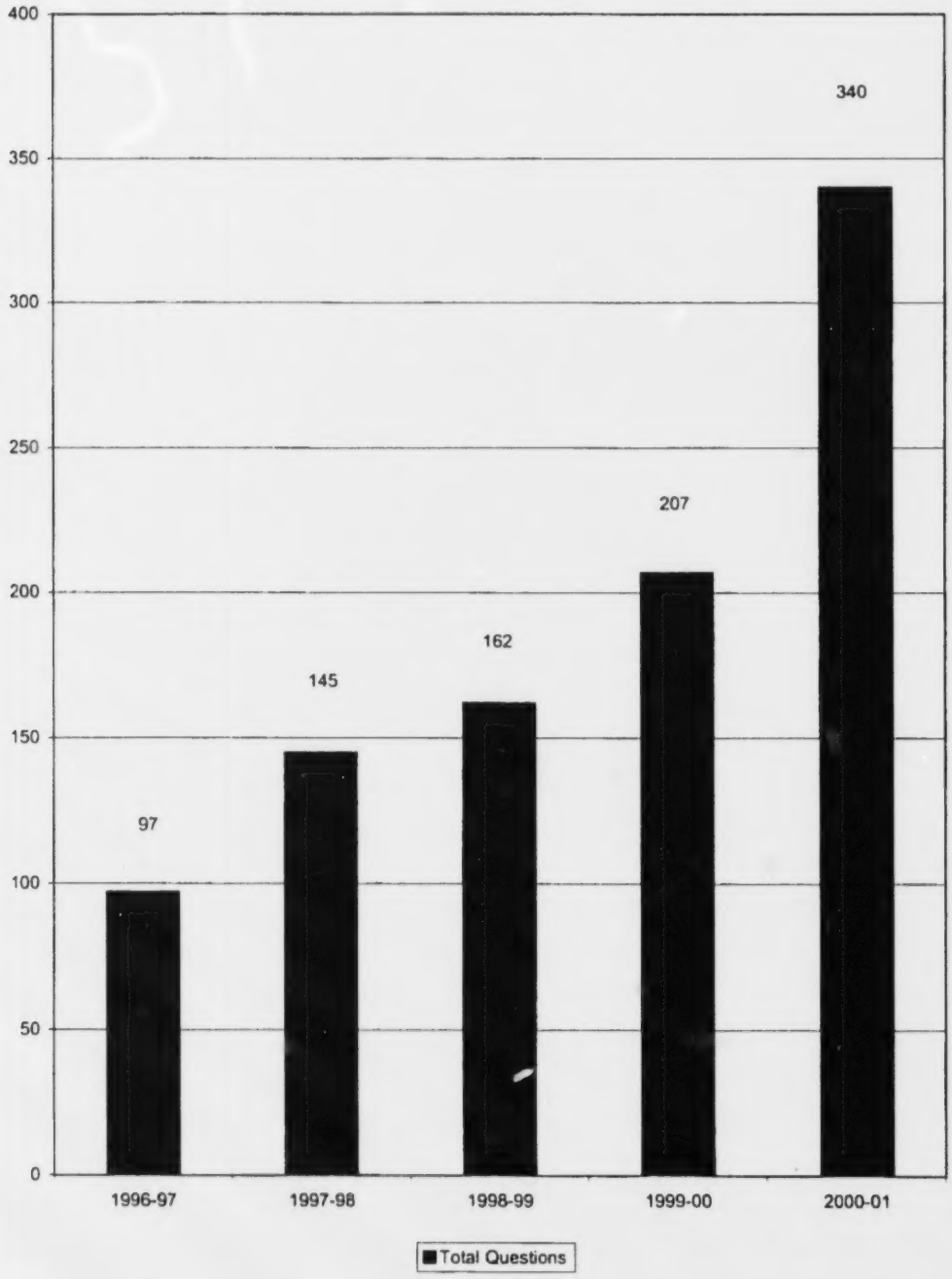
Reference Department Annual Report, 2000-2001, Chart 2
Reference Desk Statistics, 1991-2001



Reference Department Annual Report, 2000-2001, Chart 3
Reference Desk Statistics by Type of Question, 2000-2001



Reference Department Annual Report, 2000-2001, Chart 4
Reference Department E-Mail Reference Statistics, 1996-2001



UNIVERSITY of VIRGINIA LIBRARY **Management Information Services**

University of Virginia Library

Statistical Information

Annual Statistical Packet

FY 2000-2001

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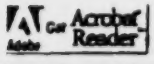

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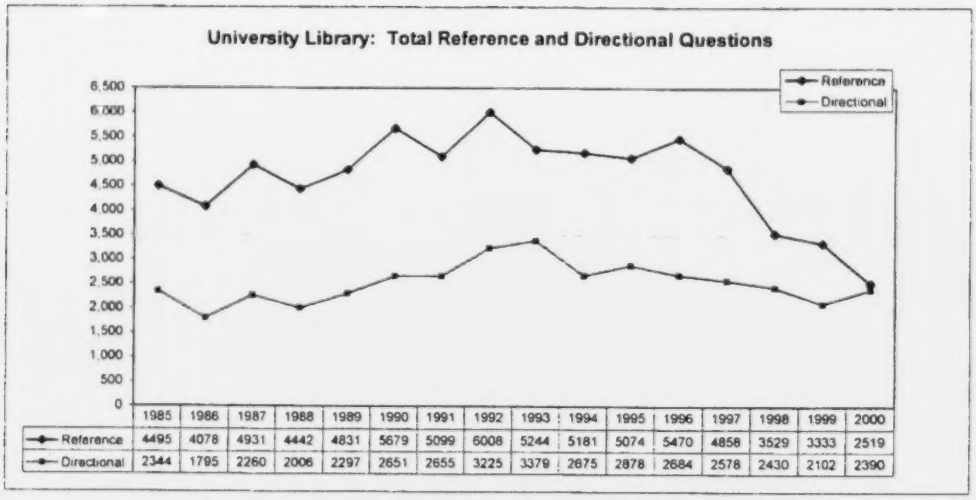
Reference Transactions

	Reference Questions	*Directional Questions*	*Equipment Questions*	*Total Questions*	*% Univ Library*
Alderman Library					
Administration	3	8	4	15	0.3%
Cataloging	0	1	0	1	0.0%
Humanities Services	7	0	0	7	0.1%
E-text Center	n/a	n/a	n/a	n/a	
Interlibrary Services	53	26	1	80	1.6%
Publications Office	n/a	n/a	n/a	n/a	
RIS					
Circulation Desk	31	56	15	102	2.1%
Reference Desk	596	267	223	1,086	22.1%
Microforms/Periodicals	143	51	113	307	6.3%
Social Science Services					
Geo Stat Center	60	15	19	94	1.9%
Govt. Info Resources	187	76	48	311	6.3%
Special Collections	220	45	15	280	5.7%
Total Alderman	**1,300**	**545**	**438**	**2,283**	46.5%
Clemons Library					
Circulation/Reference	205	218	182	605	
Digital Media Center	65	81	77	223	
Total Clemons	**270**	**299**	**259**	**828**	16.9%
Education	**363**	**161**	**74**	**598**	12.2%
Fine Arts	**131**	**56**	**73**	**260**	5.3%
Music	**25**	**9**	**16**	**50**	1.0%
Science Libraries					
Astronomy	10	8	4	22	0.4%
Biology/Psychology	90	31	54	175	3.6%
Chemistry	44	29	26	99	2.0%
Math	10	4	5	19	0.4%
Physics	53	19	17	89	1.8%
Science & Engineering	223	142	121	486	9.9%
Total Science	**430**	**233**	**227**	**890**	18.1%
Total University Library*	***2,519***	***1,303***	***1,087***	***4,909***	100.0%
% of all questions	51.3%	26.5%	22.1%		
Year Total University Library*	***100,760***	***52,120***	***43,480***	***196,360***	
Darden**	6,300	3,800	n/a	10,100	
Health Sciences**	28,822	22,710	n/a	51,532	
Law***	26,200	n/a	n/a	26,200	
Total University Libraries	***162,082***	***78,630***	***43,480***	***284,192***	

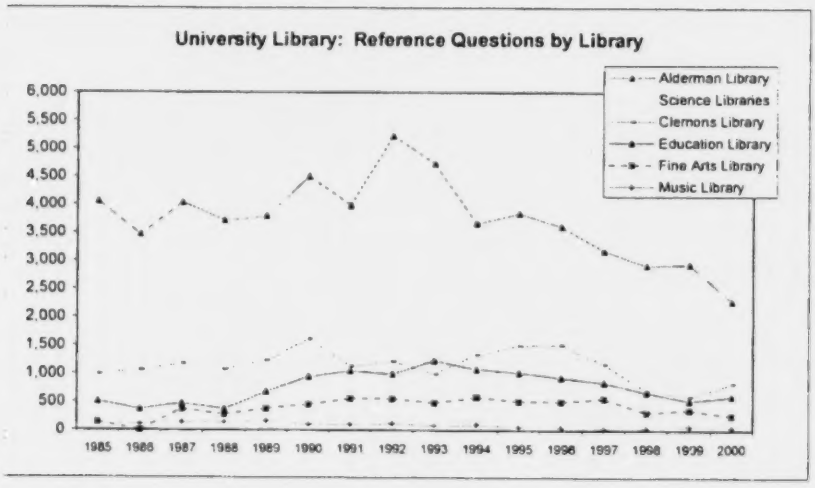
*Reference and directional questions tallies are a weekly average of a two week sample period.

**Projection based on sample of 4 randomly chosen days per month; same 4 days are used for each month.

*** Projection based on weekly average.



	1985	1986	1987	1988	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000
Reference	4495	4078	4931	4442	4831	5679	5099	6008	5244	5181	5074	5470	4858	3529	3333	2519
Directional	2344	1795	2260	2006	2297	2651	2655	3225	3379	2675	2878	2684	2578	2430	2102	2390



BEST COPY AVAILABLE

Other Reference Assessment Methods

Virtual Reference Evaluation

Thank you for taking a moment to provide feedback about this service. The information collected will be for research purposes and to make future improvements. Your response will be kept anonymous and confidential, and only grouped responses will be presented in any reports or documents prepared from this information. you are under no obligation to participate in this evaluation, and can exit immediately if you wish.

1) Did we answer your question(s)? ○ Yes ○ No

2) Would you use V-Ref service again? ○ Yes ○ No

3) Did you find the software interface easy to use? ○ Yes ○ No

4) When are you usually online doing your research? (Check as many as are applicable)

☐ 9am-5pm ☐ 5pm-10pm ☐ 10pm-2am ☐ 2am-6am ☐ 6am-9am

5) Please indicate your University of Alberta connection: Undergraduate Student

6) How did you hear about V-Ref?(Check as many as applicable)

☐ Link on U of A Libraries WebSite ☐ Library Workshop/class

☐ Campus Newspaper or Radio ☐ Colleague or Friend

☐ Poster, Bookmark or flyer

7) What other UA Libraries' reference services have you used?

☐ UA Libraries' email reference service

☐ Called UA Library on the phone

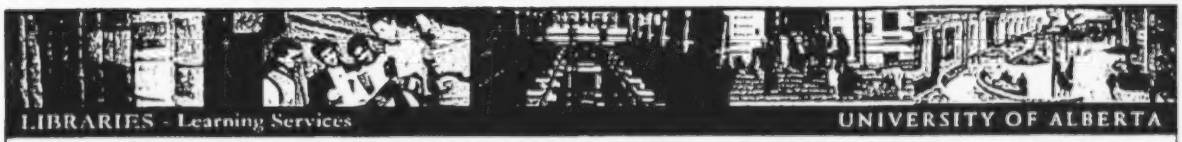
☐ Asked a question at the reference desk in a UA Library

☐ I have never used any services

8) I am a distance education student? ○ Yes ○ No

Thank you for participating in a University of Alberta online reference session.

Exit



E-mail Reference Evaluation

Thank you for taking a moment to provide feedback about this service. The information collected will be for research purposes and to make future improvements. Your response will be kept anonymous and confidential, and only grouped responses will be presented in any reports or documents prepared from this information. This questionnaire has received approval from the Faculty of Arts Research Ethics Board. You are under no obligation to participate in this evaluation, and can exit immediately if you wish.

1) Did we answer your question(s)? ○ Yes ○ No
2) Would you use E-Ref service again? ○ Yes ○ No
3) Did you find the service easy to use? ○ Yes ○ No

4) When are you usually online doing your research? (Check as many as are applicable)

☐ 9am-5pm ☐ 5pm-10pm ☐ 10pm-2am ☐ 2am-6am ☐ 6am-9am

5) Please indicate your University of Alberta connection:
Undergraduate Student

6) How did you hear about E-Ref?(Check as many as applicable)
☐ Link on U of A Libraries WebSite ☐ Library Workshop/class
☐ Campus Newspaper or Radio ☐ Colleague or Friend
☐ Poster, Bookmark or flyer

7) What other UA Libraries' reference services have you used?
☐ UA Libraries virtual reference service
☐ Called UA Library on the phone
☐ Asked a question at the reference desk in a UA Library
☐ I have never used any services

8) I am a distance education student? ⁻ Yes ⁻ No

Thank you for completing our survey.

The information you submit above is collected under the authority of s.32 (c) of the Freedom of Information and Protection of Privacy Act, S.A. 1984, c. F-18.5. It is collected for research purposes and to evaluate the E-mail reference service and will not be used for any other purpose. If you have any questions regarding the collection or use of this information, contact Kathryn Arbuckle, Law Centre, University of Alberta, Tel: (780) 492-3717 Fax: (780) 492-7546.

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http://www.fsu.edu/~library/forms/ref-survey.html

WebLUIS
Other FSU Libraries Databases
Branches and Departments
Library Locations
Library Hours
Instruction & Information Resources
FSU Library Services
Library Forms
Interlibrary Loan
University Libraries Home Page
FSU Home Page
Friends of the Library
Faculty Senate Library Committee

FSU Libraries Electronic Reference Service Survey

Your participation in this survey will help the FSU Libraries assess their e-mail reference service. Please answer the following questions and click on the SEND button to submit your responses.

1. How long did you expect it to take us to answer your question?

2. Were you satisfied with the timeliness of the response?

○ Yes ○ No

3. Was our service easy to use?

○ Yes ○ No

4. Did you find our staff helpful?

○ Yes ○ No

5. Did you find our staff knowledgeable?

○ Yes ○ No

6. Did you find our staff friendly?

○ Yes ○ No

7. Did you feel that you received personalized service?

○ Yes ○ No

8. How did this e-mail service help you? (Check all that apply.)

☐ Answered an information need
☐ Solved an information problem
☐ Saved time

- ☐ Provided access to resources you didn't have
- ☐ Made a difference in your personal life
- ☐ Made a difference in your academic/professional life
- ☐ Other (Please explain)

☐ Didn't help. (Please explain)

9. Is this the first time you've used this e-mail reference service?

○ Yes ○ No

10. If this is the first time you've used this service, what was your primary reason for using it?

- ○ Distance from physical library facility
- ○ Lack of alternative library services
- ○ Hours service was available
- ○ Saved time
- ○ Less work for me
- ○ Personal service
- ○ Access to resources I can't afford
- ○ Other

11. If you have used this service before, what was your primary reason for using it again?

- ○ Satisfaction with previous service
- ○ Distance from physical library facility
- ○ Lack of alternative library services
- ○ Hours service was available
- ○ Saved time
- ○ Less work for me
- ○ Personal service

- Access to resources I can't afford
- Other

12. How did you find out about this service?

- Library Instruction Class/Workshop/Orientation
- Brochure/Handout
- Faculty referral
- Referral by peers
- Found link on Internet
- Found link on Library Web page
- Other

13. How can we improve our service?

14. Do you have any comments about this service?

Thank you for participating in this survey!

SEND | RESET

UGA LIBRARIES USE SURVEY

As part of a review of the University Libraries, we ask that you please complete this survey to gather information about your use of the University Libraries and to assess your satisfaction with library services. Your opinions are vital to us and your responses will guide our efforts in shaping the Libraries' services to meet your needs. Please note that the Law School Library is administered separately and is not covered by this survey.

Your response will be confidential. Survey results will be used by various committees involved in this review. Please take time now to complete the survey, refold it, and drop it into campus mail. Thank you.

William Gray Potter
Director of Libraries

1. Please indicate your status and primary college or school at the University.

Faculty ___ Grad Student ___ Undergraduate ___ Other _____

Which of the following libraries do you use?

___ Main only
___ Science only
___ Both libraries

If both libraries, which do you use most often? _____

2. How frequently do you use the following sources for finding information needed in your work?

	Weekly	Monthly	Quarterly	Less Often/NA
UGA Libraries (includes dial access to computer system)	3	2	1	0
Other Libraries	3	2	1	0
Internet/World-Wide Web	3	2	1	0
Electronic bulletin boards/discussion lists	3	2	1	0
Departmental resources	3	2	1	0
Personal books, journals	3	2	1	0
Colleagues/friends	3	2	1	0
Other, please specify	3	2	1	0

_____

3. How often do you use the services and collections of the UGA Libraries?

	Weekly	Monthly	Quarterly	Less Often/NA
Visit in person	3	2	1	0
Send someone to collect material	3	2	1	0
Use office/lab computer to search library files	3	2	1	0
Use home computer to search library files	3	2	1	0
Use e-mail to make an inquiry	3	2	1	0
Use telephone to make an inquiry	3	2	1	0

4. Do you access the library through an office/lab computer that is hardwired to the campus network? Y N

Do you access the library through a computer that has a modem? Y N

If you have access to a computer, what type is it?

	PC DOS only	PC MS Windows	Macintosh	Unix based
Office/Lab	Y / N	Y / N	Y / N	Y / N
Home	Y / N	Y / N	Y / N	Y / N

5. Due to the use of computers and new information technologies are you more or less likely to?

	More Likely	Unchanged	Less Likely	Don't Know
Visit library in person	3	2	1	0
Use library journals	3	2	1	0
Use library books	3	2	1	0
Use library media (audiovisual materials)	3	2	1	0
Find useful bibliographic citations	3	2	1	0
Consult reference librarian	3	2	1	0
Use library instructional services	3	2	1	0
Use interlibrary loan	3	2	1	0
Acquire material from commercial sources	3	2	1	0
Keep current in your field	3	2	1	0
Exchange information with colleagues/friends	3	2	1	0
Use library reserves	3	2	1	0
Other, please specify				

_____

6. How important do you think the following resources will be to you in the coming two years?

	Very Important				Not at all Important
Books (print)	5	4	3	2	1
Journals/newspapers (print)	5	4	3	2	1
Journals/newspapers (electronic text)	5	4	3	2	1
Computerized indexes to journals	5	4	3	2	1
Manuscripts & archival materials	5	4	3	2	1
Media (audiovisual materials)	5	4	3	2	1
Foreign language materials	5	4	3	2	1
Other, please specify	5	4	3	2	1

_____

7. **Please mark the library catalogs and databases below (available through GALIN, Libra & GALILEO) that you use at least monthly.**

GALIN

___ 01 UGA Libraries Catalog
___ 02 Academic American Encyclopedia
___ 03 Art Index
___ 04 Biosis
___ 05 Business Index
___ 06 Current Contents Plus
___ 07 ERIC
___ 08 Expanded Academic Index
___ 09 Newspaper Abstracts
___ 10 PsycINFO

Libra

___ 11 Agricola
___ 12 America: History & Life
___ 13 Analytical Abstracts
___ 14 CAB
___ 15 Compact Disclosure
___ 16 EconLit
___ 17 Government Publications
___ 18 Historical Abstracts
___ 19 LEXIS/NEXIS
___ 20 Linguistics & Language Behavior
___ 21 MLA
___ 22 Medline
___ 23 OCLC
___ 24 Social Work Abstracts
___ 25 Sociofile

GALILEO

___ 25 ABI/Inform
___ 26 Britannica
___ 27 Business Dateline
___ 28 Periodical Abstracts
___ 29 Netscape

Other: _____

_____

_____

_____

_____

8. **Please circle your top three priorities for the Libraries during the next two years.**

01 Provide access to full text documents on my computer
02 Build book and journal collections
03 Network more bibliographic databases
04 Fax articles from document delivery companies
05 Provide reserve materials electronically
06 Preserve library materials
07 Provide individualized consultations
08 Provide more instruction
09 Reshelve items more quickly
10 Provide additional study space

9. **How satisfied are you with the Libraries' collections?**

	Very Satisfied			Somewhat Satisfied	No Opinion
Book collection	4	3	2	1	0
Reference collection	4	3	2	1	0
Magazines, journals, newspapers	4	3	2	1	0
Manuscript, rare book collections	4	3	2	1	0
Maps, GIS software	4	3	2	1	0
Music collection (CDs, scores, etc.)	4	3	2	1	0
CD-ROM databases	4	3	2	1	0
Videos, films	4	3	2	1	0
Overall Satisfaction	4	3	2	1	0

Comments: _____

_____

10. How satisfied are you with the Libraries' services?

	Very Satisfied			Somewhat Satisfied	No Opinion
Information assistance	4	3	2	1	0
Computer systems (GALIN, Libra, etc.)	4	3	2	1	0
Returning/Renewing books	4	3	2	1	0
Course reserves	4	3	2	1	0
Library hours	4	3	2	1	0
Copy services	4	3	2	1	0
Photographic services	4	3	2	1	0
Ease of locating items	4	3	2	1	0
Instructional classes/tours	4	3	2	1	0
Interlibrary loan	4	3	2	1	0
Facilities	4	3	2	1	0
Response to materials purchase requests	4	3	2	1	0
Overall Satisfaction	4	3	2	1	0

Comments: _____

_____

Thank you for participating in this survey. Please fold and fasten your response with the return address showing and put the survey in campus mail.

Report for Management Information Services
University of Virginia Libraries

April 27, 2001

Ellen Catalano, M.A.
Consultant, Human Resource Development

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I. Introduction

A trend has emerged in the past several years pointing to a decline in the use of reference librarians throughout American university libraries. This trend has been confirmed most recently in statistics compiled by Management Information Services at the University of Virginia, showing a downward trend since FY1993 in use of reserve circulation and number of reference questions. Reserve circulation has dropped an average of 10% per year from 1993 to 2000, and the average change per year of number of reference questions since 1993 is –9.5%. MIS reports that they still receive "a lot" of reference questions (an estimated 100,000in FY2001), but the annual total is less than half that in FY1993.

Speculation as to why this may be occurring is centering primarily around the emergence and popularity of the Web. However, MIS, curious about what else may be contributing to this downward trend, decided to conduct a series of focus groups to further explore the issue. I was hired as facilitator of these focus groups, and as an independent consultant, a neutral observer of the issue.

II. Methodology

A random sample of three groups of library users were coordinated: one group of faculty, one group of graduate students, and one group of undergraduate students. Approximately 20 persons were invited to participate in each group; Between 10 and 11 persons actually showed up for each one hour session. The participants in each group represented a variety of academic disciplines, ranging from the Arts to biology to engineering. The questions asked of each group were:

1. How do you use the library now?

2. What does the term "reference" mean to you?

3. When and how do you use the Web for information? How good an information source is it?

4. Are there information resources that the library does not offer, but should offer?

5. (Faculty and graduate students only)
How have undergrads changed in their use of the library? Do you see a difference in the quality of their assignments and research papers?

5. (Undergraduate students only)
When do you ask library staff for help?

6. There has been a significant reduction in use of reference librarians documented both locally and nationally; Can you comment on this?

Each focus group began with a brief introduction from the facilitator to explain the following:

-The facilitator, an independent consultant, was not part of the university system and therefore a neutral observer and recorder;

-The facilitator would record all responses in their entirety, check for clarity and keep the group going and on task until there were no more responses to each question;

-The facilitator invited the group to go back and add and/or edit any responses as they saw fit;

-All responses were recorded on flip chart paper and posted in order of the questions asked. In addition, a second recorder took notes on a notepad for future clarification of responses, if needed.

-The facilitator and second recorder typed up all responses and combined them into the section entitled "Raw Data" which you see in an attachment at the end of this document.

III. Summary of responses by question

The following is a comparison of all three groups' responses to each question. I selected from the raw data primarily the first answer(s) to the question, followed by emerging themes across groups.

1. How do you use the library now?

Faculty:
- 90% of the time I use LEO (6 responses) *Hereafter referred to as "6X"
- 60-70% of the time I use LEO (3X)
- Interlibrary loans, including microforms
- Special collections
- Rely on library staff for student orientation

Grads:
- To look up journal articles (7X)
- Do citation searches
- To get books and films
- Interlibrary loan (9X)
- Recall books (9X)
- Special collections

To use Virgo to search the web and catalogs (11X)
Etext and data bases available online (10X)

Undergrads: To study (7X)
Research, write papers
Print out documents, Email

2. What does the term "reference" mean to you?

Faculty: Access to search engines
Way to teach students how to use the library system
Staff holds the key to finding information
Certain data bases browsers where we need reference to help us low how to use

Grads: Librarians are incredibly helpful, amazed at their knowledge, can direct me quickly (11X)
Reference means databanks now instead of a room

Undergrads: Help desk
Help with research
Finding information

3. When and how do you use the Web for information? How good an information source is it?

Faculty: JSTOR, Virgo, Etext, Gale, Google, Making of America, everything
Acess to archival collections
Need to be careful in looking at various uses/users and not average them together, because different disciplines have different needs, i.e. humanists/scientist. Hence some data bases don't show up on conventional search engines, making the human resources in libraries all the more necessary.

Grads: All the time; it's an excellent source
To get information not physically housed in library, such as journals, newspapers, magazines, original documents, children's books (11X)
Web is a way to do research, find collections of materials related to your topic, find information
Web resources have gotten better in the last five years

Undergrads: Use Web a lot, but have to know what you are looking at because anyone can publish and they do not have to be factual
Need to be selective, careful of resource, how reliable it is

Use it as a starting point, although don't cite from it, i.e. Salon.com, Altavista, then go to books
Have to verify Web information in books and articles
Web is more up-to-date, especially for court cases, psychological research; this is less true for history research
Web is better for quickly developing fields

4. Are there information resources that the library does not offer, but should offer?

Faculty: Happy with how it works now
Need someone who creates an information clearing house that is customized for a particular audience

Grads: More workstations integrated into stacks
More laptops
More Mac laptops (3X)

Undergrads: Darden and Law have specialized research not available elsewhere and you need a password/access to this; would be nice if undergrads had same availability

5. (Faculty and graduate students only)
How have undergrads changed in their use of the library? Do you see a difference in the quality of their assignments and research papers?

Faculty: Students need to acquire the ability to discriminate and evaluate
Students in the lower level courses need to be exposed to the research process; they often do not know how to do research when they reach the 300-400 level courses
Heavy reliance on the canned e-search tools and extreme under-reliance on primary research

Grads: Can see deterioration in papers and work since Web became prevalent
Undergrads rely solely on electronic sources; ignore information that is in books only; excessive reliance on the Web
Not sure there is much difference either way; Depends on how motivated the students are.

5. (Undergraduate students only) When do you ask library staff for help?

Undergrads: When can't find a book that is supposed to be on the shelf
When a printer breaks which is a lot
Finding journals, understanding Virgo
Because librarians are more in touch with what's available and how to weed through it.

6. There has been a significant reduction in use of reference librarians documented both locally and nationally; Can you comment on this?

Faculty: Disseminate information about how reference can be used, i.e. be more active in marketing
Reference can be more proactive – tell what references can be accessed in particular data bases

Grads: Have real time online capability
Ask undergraduates to do 3-5 page papers, not research
Institutionalize and encourage reference/research process as part of undergraduate education

Undergrads: It's easier and we're starting earlier to do research online
Easier to ask a friend for help than a reference librarian; so maybe use a student (peer counselor) to help people get excited about using the library in general
Reference staff blow you off; they are too busy dealing with printers

IV. Summary of general themes emerging from data

Two general themes emerge from the data. First and most notable is that all three groups commented repeatedly on the usefulness of reference librarians to direct them to the right resources. Reference librarians were and are able to help all levels of student "weed" through the various databases and find the one(s) right for the student and faculty member. Reference librarians perform a variety of other useful functions not necessarily connected to the research process, for example, fixing printers and directing students around the library.

Second, there is an apparent disparity in perception of the deterioration in quality of undergraduate work since the appearance of the Web. Both faculty and graduate student groups stated a definite decline in quality of papers, claiming an undergraduate lack of basic research knowledge. However, there was also a comment made in the graduate group that the Web had nothing to do with it; that it depended on student motivation. The undergraduate group, however, repeatedly commented on the unreliability of Web sources, and that they would need to access primary sources through books and journals for quality research papers. However, they also admitted to using the Web often and repeatedly to see "what's out there".

V. Conclusion

This limited study cannot give us definitive answers. It does, however, offer us some perspective when we analyze the decline of reference librarian use. Reference librarians still appear to be needed by these three groups for understanding the various data bases available and how to access them. It is clear that there was a lot of energy around this issue; people appeared to be reluctant to leave when the hour was up and wanted to discuss the use of the library and its resources further. People commented that they definitely learned something as a result of these focus group discussions. For example, they learned what resources the library does have to offer.

To that end, some possibly useful suggestions emerged, such as putting phones in stacks to reach the reference desk, and location of the desk itself. The need for reference librarians to be "customer friendly" was emphasized; They need to seem "approachable", as sometimes they appear to be too busy and unapproachable. Special services that reference librarians have to offer, such as subject specialists, seemed to be a "new" resource just discovered by some participants in these groups. The issue of how the library could help educate students about the research process was debated.

The library might consider repeating three focus groups again with an emphasis on selecting certain disciplines for representation, to see if different issues emerge based on the needs of the disciplines. For example, the questions and needs of a student in the fine arts would vary significantly from an engineering student. Also, it would be interesting to see if other libraries are conducting focus groups around this issue.

SPEC

SELECTED RESOURCES

ASSOCIATION OF RESEARCH LIBRARIES

OFFICE OF LEADERSHIP AND MANAGEMENT SERVICES

Books, Journal Articles, and Web Sites

Association of Research Libraries. "LibQUAL+." Washington, DC: Association of Research Libraries, 2001. <http://www.arl.org/libqual/>

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Seleb, David, and Glenn Kersten. "Selected Bibliography of Reference Statistics Sources." Burr Ridge, IL: Suburban Library System. <http://www.sls.lib.il.us/reference/workshop/refstatbib.html>

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Van House, Nancy A., et al. *Measuring Academic Library Performance: A Practical Approach*. Chicago: American Library Association, 1990.

Warner, Debra G. "A New Classification for Reference Statistics." *Reference and User Services Quarterly* 41, no.1 (Fall 2001): 51–55.

Witucke, A. Virginia. and C.J. Schumaker. "Analyzing Reference Activities: The Affordable Solution. Statistical Analysis of Reference Services at the Northern Virginia Office of Central Michigan University's Off-campus Program." *RQ* 31 (Fall 1991): 58–69.

SPEC KIT ORDER FORM

QTY		TITLE
____	SP268	Reference Statistics
____	SP267	User Authentication
____	SP266	Staffing the Library Website
____	SP265	Instructional Support Services
____	SP264	Extended Library Hours
____	SP263	Numeric Data Services
____	SP262	Preservation & Digitization
____	SP261	Post-Tenure Review
____	SP260	Interview Process
____	SP259	Fee-based Services
____	SP258	Corporate Annual Reports
____	SP257	MLS Hiring Requirement
____	SP256	Changing Roles of Lib Profs
____	SP255	Branch Libs/Discrete Collectns
____	SP254	Managing Printing Services
____	SP253	Networked Info Services
____	SP252	Supprt Staff Classifictn Studies
____	SP251	Electronic Reference Service
____	SP250	TL10: Educating Faculty
____	SP249	Catalogng of Resrces Digitized
____	SP248	Licensing of Electronic Prodcts
____	SP247	Management of Lib Security
____	SP246	Web Page Devel & Managmnt
____	SP245	Electronic Reserves Operations
____	SP244	TL 9: Renovation & Reconfigur.
____	SP243	TL 8: Users with Disabilities
____	SP242	Library Storage Facilities
____	SP241	Gifts and Exchange Function
____	SP240	Marketing and PR Activities
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